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# A Holistic Approach to Association Volunteer Management

How Associations Are Supporting—and Can Improve—Their Volunteer Management Systems

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## Executive Summary

Association leaders understand—or perhaps simply accept—the importance of volunteers. Yet developing a mutually beneficial volunteer system that fully leverages the potential of volunteers to effectively move the mission and meet member needs can be a struggle. The challenge persists and is accompanied by a new sense of urgency in improving volunteer systems, largely in response to large-scale disruptors such as increased focus on diversity, equity, and inclusion and the demand to optimize governance.

This ASAE Research Foundation study offers a view of association volunteering on the verge of modernization. Data show that modest shifts in association practices and volunteering are occurring. The clearer indication of change comes from the observations and on-the-job experience of the foundation's Research Advisory Council (RAC), association practitioners who served as a sounding board and voice for the practical application of the study's findings.

“As association professionals, it is our job to make engaging with the association a positive, productive, impactful, and meaningful experience. Creating structures that make this possible requires intentionality, resources, strategy, and futures thinking. This report will help associations customize their approach and infrastructure to build mutually beneficial volunteer programs.”

— **Lindsay Currie, CAE**

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## Observations and Insights

### 1 Associations generally do not have a single definition of effective volunteering and often determine success based on measurable outcomes and outputs rather than impact.

#### Observations

Association staff and volunteers view job execution, achievement of key goals, and meaningful participation as indicators of effectiveness. However, associations generally lack independent, objective metrics by which to assess success. This may lead to a difference seen in the perception of volunteer effectiveness between association staff and the volunteers themselves. Association staff rated less than one third (29 percent) of their volunteers as highly effective whereas volunteers rated nearly half (46 percent) of their colleague-volunteers highly effective. And tellingly, 44 percent of associations indicated that they would replace some volunteer roles with staff if they could.

#### Insights

Based on a literature review and results from this study, there is no one single definition of effective. However, the presence of a definition is needed to make the critical decisions about this mode of workforce. Associations should develop a valid, clearly defined purpose for the use of volunteers that fully aligns with the capacity of the volunteer pool to fulfill that purpose and for the association to support their effort.

### 2 Structure affects satisfaction and perceived effectiveness.

“A key component of a holistic system is supporting and training staff to be effective partners with volunteers—that is a key piece of long-term sustainability.”

— RAC volunteer

#### Observations

Overall, associations that implement many of the management features found to be strengths in the 2017 ASAE Research Foundation study *Mutually Beneficial Volunteerism*—and that are standards of human resource management—rated their volunteers more highly effective. This suggests that volunteer management success depends on clear models that provide a stable infrastructure. Additionally, several studies identified in the study’s literature review supported a volunteer management approach based on universal practices from a human resource management model—specifically noting the correlation between volunteer satisfaction and a universally used management model.

#### Insights

An effective framework grounds an association’s volunteer management into a holistic system that is mutually beneficial to the volunteer, the association, and ultimately the member. Such a system should have three key elements: (1) a valid, clearly defined purpose for the use of volunteers that fully aligns with the capacity of the volunteer pool to fulfill that purpose and for the association to support their effort; (2) volunteer job design that accurately reflects that purpose and capacity; and (3) an assessment process that offers an objective, valid, and reliable evaluation of volunteer performance. A key element of the system is a staff that is well-trained and supported in their work with volunteers.

### 3 Associations that formally assess some aspect of their volunteer system tend to employ more effective volunteer management features than those with no formal assessment.

“Effective volunteer models have an assessment process that evolves. How can we improve something if we don’t measure it? This is an area in which we need to educate our boards regarding the value of assessment in creating a better volunteer experience.”

— RAC volunteer

#### Observations

More than half of association staff reported doing some level of formal assessment, more often evaluating groups (52 percent) rather than leaders (41 percent) or individuals (36 percent). There is, however, limited understanding by volunteers regarding use of evaluation results—nearly one third (31 percent) indicated that they are unsure how assessments aid decision making.

#### Insights

Though the mere mention of assessment and volunteers may cause discomfort, they do happen, even if only largely informal. Anecdotally, the reluctance to fully embrace assessment may be a combination of orthodoxies that volunteers don’t want to be assessed and that it’s simply inappropriate to assess them (i.e., “they give their time”). Additionally, it is difficult to conduct an assessment when there are no measurable metrics or a shared definition of effective. This particular area of volunteer management is still holding most associations back in creating effective volunteer systems: An association needs a definition of effective that allows for measuring impact and driving decisions on resource allocation and strategy to optimize volunteer effectiveness.



### 4 Associations and volunteers value diversity, equity, and inclusion (DEI), yet see mixed performance.

“As far as addressing diversity, we need to be moving to have explicit job descriptions with term limits, criteria for selection, and being transparent about the process of selection. It’s more about debunking the process of how we select people, so that when we look at our current list, we can analyze how we got to a place that maybe isn’t as diverse.”

– RAC volunteer

#### Observations

Volunteers rated choosing diverse volunteers (37 percent) as one of the top three most important elements of an association’s system, just behind attracting the best people in the field (also 37 percent) and offering well-designed roles for meaningful contribution (51 percent). On performance, 62 percent of volunteers agreed that their organization chooses diverse volunteers, indicating some room for improvement, and more than half of staff indicated that having volunteers who are representative and diverse (56 percent) is a strength of their volunteer system. Additionally, just more than one in three (36 percent) of association staff respondents rated their organization’s ability to identify and recruit an inclusive and diverse pool of volunteers either excellent or good.

#### Insights

The ASAE Research Foundation report *Are Association Boards Embracing Diversity?* addresses the issue in greater detail—largely reflecting that associations, while exhibiting positive signs of integrating effective elements of diversity, equity, and inclusion, have a significant opportunity to achieve greater DEI on their boards. This is much the situation down the volunteer pipeline. Associations should move beyond traditional recruiting practices that tend to favor familiarity over competence. Rather, they need to embrace practices, such as accountability and goal setting with metrics, and connect those practices to goals and, ultimately, to the association’s financial commitment to its volunteer system.

### 5 The volunteer spirit is alive and thriving.

#### Observations

Volunteers are active in their respective associations, and overall, they are satisfied with their volunteer management system (73 percent), rating most volunteers as highly effective (46 percent) and indicating that they are very likely to remain a volunteer for the organization over the next several years (54 percent). Most (62 percent) recommend volunteering to a friend or colleague. Likewise, volunteers indicated that the major disruption caused by the COVID-19 pandemic had no effect on key aspects of their volunteer participation. Overall, volunteerism is strong, with association staff reporting that the total number of volunteers over the past five years (2017–2021) has increased (41 percent) or remained stable (37 percent).

#### Insights

The shift in volunteering is nuanced. According to the data, the shift is less the number of volunteers available to associations and more the number of hours they are willing to provide. Most are looking at the commitment and emphasizing that their strong preference is to be in a job that suits their skills and have a meaningful experience.

## Recommendations

**1** Adopt a framework that employs the characteristics of excellence for an effective volunteer model. These principles support and sustain mutually beneficial volunteer involvement in the mission and work of associations and are seen in associations that generally rate their volunteers as effective. Consider the following characteristics to support and sustain your volunteer management system:

- An organizational culture of volunteerism
- Clarity of purpose and definition of high performing
- Holistic and transparent volunteer system infrastructure
- Commitment to continuous improvement
- Professional development
- Staff readiness and preparedness
- Information and knowledge transfer
- Anticipatory capabilities and responsiveness
- Resource commitment
- Community focus
- Strong identification and connection to the profession or trade

**2** Systematically define and develop an effective volunteer model for your organization using a process model. An example is outlined in greater detail in the full report. By walking through a systematic process, you can fully assess your current model, set goals, and identify areas for improvement.

**3** Establish objective metrics for your volunteer system; consider using the Volunteer Impact Framework—A Model for Viewing Effectiveness (outlined in greater detail in this report). While the research makes the case for defining relevant metrics for an association's volunteer system, it does not, however, specify metrics. The related Volunteer Impact Template is designed to provide examples of desired outcomes and potential metrics for measuring achievement of those outcomes.



## Purpose

The ASAE Research Foundation engaged Mariner Management in a study to develop a deeper understanding of holistic models for strategically designing, implementing, and operating effective volunteer management practices in trade and professional associations. The research, built on findings from previous research conducted on the research foundation's behalf, considered a breadth of strategic and operational volunteer management elements and a wide range of volunteer functions and commitments. The research also probed how high-impact disruptors might influence the execution of a holistic volunteer management model.

This study aimed to achieve the following:

- 1 Develop an understanding of the models, practices, and strategies that associations may use to create an effective holistic volunteer management system that engages members and enables associations to increase diversity, equity, and inclusion; leverage opportunities; and navigate disruptors (i.e., what is the new volunteer management playbook?).
- 2 Develop an understanding and coherent working definition of effective for association volunteer systems, with objectively measurable attributes (i.e., how can we be sure our investment in volunteers is making a difference for volunteers, our association, and our member community?).
- 3 Derive an evidence-based method of assessment by which associations may create a focused organizational strategy and optimize the structure and processes of their volunteer management systems (i.e., how can we continually improve our volunteer system?).

Secondary goals included considering the conclusions of previous projects such as *The Decision to Volunteer and Mutually Beneficial Volunteerism* and identifying areas for future research. As is often the case, the research answered key questions and raised other questions for future research.

## Research Methodology

It is important to note that this research initiative, in building on previous research and literature (*Mutually Beneficial Volunteerism*, *The Decision to Volunteer*, *Enhancing Committee Effectiveness*, *Building Better Association Boards*, and *ASAE ForesightWorks*), considered a breadth of strategic and operational volunteer management elements. The research also considered a wide range of volunteer functions and commitments—like ad-hoc opportunities and governance responsibilities, and how high-impact disruptors, including but not limited to racial justice movements and a global health pandemic—might affect the execution of a holistic volunteer management model in the short- and long-term.

The research team took a pragmatic approach to measuring the current state of association systems and structures for providing and managing the experiences of volunteers for the mutual benefit of the member and association. Their study examined criteria for evaluating an association's volunteer program and explored the current practice of these programs, looking at key characteristics (e.g., committee structure, national/component system, methods of recruitment and orientation, and communication of opportunities and how they attempt to maximize the value of their knowledge and labor to maintain excellence in the association's operations).

This project followed two phases: (1) research and data collection studies focused on current volunteering and volunteer trends and (2) deliberative application of the strategic insights and options for taking action.

## Phase One

- **Literature review:** An in-depth review of previous research in the area, a search of relevant literature from nonprofit volunteer systems, and extensive discussion with various stakeholder groups to develop a shared understanding with ASAE Research Foundation staff and the Volunteer Management Task Force regarding the research goals, research questions, and study design.
- **Qualitative research:** 30 individual interviews with a broad sampling of the association community along with seven focus groups designed to explore perceptions unearthed and additional questions raised in the individual interviews.
- **Quantitative research:** Association staff received a questionnaire-based survey. Responses from 667 association executives representing 648 unique organizations addressed the research questions outlined previously, including the attributes of current systems, based on the mutually beneficial volunteer management system model, to determine what may contribute to an effective holistic system.
- **Quantitative research:** Association volunteers received a parallel questionnaire-based survey. Responses from 6,260 volunteers representing 49 associations addressed the research questions outlined previously, including the attributes of current systems, based on the mutually beneficial volunteer management system model, to determine what may contribute to an effective holistic system.

The qualitative research in phase one incorporated individual interviews and focus groups that explored coherent working definition(s) of an effective volunteer with objectively measurable attributes. The interviews provided a look into individual situations while the focus group format allowed participants to reflect on and build on the responses of other participants. The research objectives included the following:

- Sample the attitudes and experiences of those who manage volunteers related to the assessment of volunteers and their work.
- Develop a richer source of information on how associations define and measure effectiveness for volunteers, volunteer groups, and the volunteer strategy.
- Generate ideas or hypotheses around how associations use knowledge about volunteer effectiveness in designing and supporting volunteer models and the volunteer experience.

The quantitative studies in phase one incorporated many of the questions from the 2017 Mutually Beneficial Volunteerism research to confirm what, if any perceptions, had changed. The surveys also added a number of questions around the definitions of effectiveness identified in the individual interviews and focus groups. Subsequent crosstabs of the results allowed researchers to evaluate perceived effectiveness against the attributes of both individual volunteers and the volunteer system as a whole. The perceptions of staff and volunteers were also compared with respect to their assessment of individual and overall system effectiveness.

## Phase Two

- **Application of the findings:** The Research Advisory Council (RAC), composed of CEOs from 15 organizations, reviewed the findings and, through extensive discussion, provided feedback and observations on how the research informed a working framework for defining effective volunteer systems along with a process for assessing systems in place and evaluating their impact.

Throughout the two phases, the research team worked closely with ASAE Research Foundation staff and the Volunteer Management Task Force. This task force, made up of volunteer members from the ASAE Research Foundation Research Committee and other association professionals, developed the research questions, served as guides throughout the research project, and raised questions and challenged assumptions to aid the research team in the process.

Using this research: Association staff estimated that about 30 percent of their members have contributed and are currently contributing to their association, which may represent a significant number of an association’s workforce. This research sought to move beyond a look at systems currently in place to begin a journey of defining the volunteer systems for tomorrow, for the workforce of today. Use these findings, recommendations, and information found in the detailed findings section of this report as a resource to move forward on that journey.

Deciphering Effectiveness

We define effectiveness for the purposes of this research as the degree to which something is successful in producing a desired result.

In an effort to understand how associations can be sure investments in volunteers are making a difference for volunteers, our association, and our member community, we examined effectiveness at both the individual and system levels.

The research sought to understand:

- 1. What is an effective volunteer?
- 2. What is an effective volunteer management system?

Three key themes emerged:

- 1 Overall, both staff and volunteers value execution, achievement of key goals, and meaningful participation.
- 2 Associations generally lack independent, objective metrics by which to confirm volunteers’ overall effectiveness or assess if execution was successful, participation meaningful, or key goals clearly achieved.
- 3 Association staff tend to view volunteer effectiveness less favorably than the volunteers view it themselves.

Two in five (40 percent of association staff reported having no formal volunteer-assessment process at all, and of the 60 percent who do, only half assess volunteer groups (52 percent and roughly two in five assess individuals (36 percent or leaders (41 percent. This general absence of a consistent and objective assessment process for both individual volunteers and groups indicates that the identification of an effective system may rely on a mix of subjective and objective evaluation by staff. Therefore, lacking an independent, completely objective metric by which to confirm volunteer effectiveness among the participating associations, we queried staff and volunteers regarding their perception of the overall effectiveness of the volunteers in their organization.

As noted below, volunteers offer a far more positive assessment of the volunteers in their association than staff. Likely, based on discussions with the Research Advisory Council (RAC, this rosier view reflects a more intrinsic and perhaps emotional perception of the volunteer role (we love doing what we do from the volunteer perspective, while staff may be more extrinsic and transactional in their evaluation (we need to get association work done. This dichotomy may also reflect the general absence of an objective and transparent assessment process shared among all participants in the volunteer system. Only 16 percent of staff respondents in associations that do formal individual assessments indicated that these assessments are shared with individual volunteers.

Table 1. Perceived Effectiveness of Volunteers

	Staff	Volunteers
Highly effective	29%	46%
Mostly effective	31%	46%
Somewhat effective	24%	16%
Not at all effective	15%	9%

Source Association Staff Survey and Volunteer Experience Survey: What percentage of your volunteers would you estimate are highly effective, mostly effective, somewhat effective, not at all effective? Please answer so that your total adds up to 100%.

**Table 2. Total Chapter Volunteers Overall and by Perceived Effectiveness**

	All	Perceived Effectiveness Score *		
		Low	Medium	High
Total number of geographically defined chapters	62.6	85.3	85.4	29.7
Total number of individuals serving in formal/informal roles in chapter	532	869.2	352.6	334.8

\* The effectiveness score is an aggregate representation of the effectiveness rating discussed above. Source Association Staff Survey: Thinking back over the past year (January 2021–December 2021) enter the total number of geographically defined chapters and total number of individuals serving in formal/informal roles in chapters.

Chapter leaders appeared to be far less effective from the staff perspective than other volunteers. This perception likely results from the less direct and perhaps antagonistic relationship between headquarters staff and chapter leadership where an “us versus them” culture often prevails, especially among independently incorporated chapters as found in the 2019 Chapter Benchmarking Study conducted by Mariner Management and Billhighway.

## System Effectiveness: A Staff Perspective

To identify the features of an effective volunteer management system, we focused on the prevalence of commonly seen attributes and the extent to which the staff perception of and formal assessment of effectiveness tracked with those attributes. Each attribute was ranked on a four-point scale from “always” to “never” employed. Attributes with scores closer to 4.00 are employed more often than those with a score closer to 1.00.

**Table 3. Volunteer Management Features Employed by Associations Overall, by Perceived Effectiveness, and by Instances Among Associations With Formal Assessments**

	All	Perceived Effectiveness Score *			Formally Assess	
		Low	Medium	High	Yes	No
Have a board liaison assigned for committees	3.09	3.19	2.93	3.21	2.94	3.17
Send a direct invitation to all members periodically to encourage volunteering:	2.88	2.74	2.95	2.94	2.65	3.03
Have strong cross-departmental coordination among staff who manage the work of volunteers	2.83	2.56	3.04	2.92	2.69	2.96
Have a systematic workplan to align activities of committees/volunteers to organizational priorities	2.74	2.42	2.83	2.98	2.34	3.00
Provide an orientation process for new and other interested volunteers	2.66	2.35	2.53	2.94	2.24	2.83
Provide an orientation process for new and other interested volunteers	2.56	2.39	2.64	2.70	2.22	2.78
Have specific staff/department responsible for overall volunteer coordination/management	2.51	2.33	2.59	2.66	2.28	2.68
Reserve some seats on our board to ensure full representation of select membership segments...	2.22	2.06	2.21	2.33	1.86	2.37
Have a training and development program for volunteers to provide them the skills needed to fulfill their role	1.84	1.64	1.79	2.08	1.51	2.01
Use an evaluation process to measure the quality of a volunteer’s experience	1.74	1.56	1.62	2.05	1.33	1.96
Use an evaluation process to measure the quality of a volunteer’s work output	1.55	1.36	1.49	1.75	1.21	1.74

\*The effectiveness score is an aggregate representation of the effectiveness rating discussed above. Source Association Staff Survey: Does your organization engage in the following activities to manage your volunteers?

# Research Study Findings

This analysis highlights the extent to which staff who rate their volunteers most effective and have a formal assessment process more often implement almost all the features identified in the list. The most prevalent feature is the presence of a board liaison to committees, which is a current common practice used by associations.

While this correlation may be a tautology (i.e., we take care of our volunteers; therefore, they do well), it may also speak to a key cultural attribute that we have seen in associations that appear to have the most robust volunteer pools—they place great value in the contribution of volunteers to the mission and members of the association and allocate their resources and care accordingly.

Staff and volunteer training as well as volunteer evaluation ranked at the bottom of the list in most cases, which, as the RAC noted, are two areas that may yield the highest return. (See more in the detailed findings section of this report.)

## System Effectiveness: The Volunteer Perspective

We examined the volunteer perspective of system effectiveness from both an individual and an organizational viewpoint. At the individual level (i.e., volunteer motivation and career satisfaction) three findings stand out:

- An altruistic or extrinsic driver, giving back to my industry or profession, far outranked self-focused or intrinsic drivers such as expanding my professional network and increasing my personal visibility/advancing my career.
- Importance and satisfaction tracked almost one-to-one.
- Satisfaction and perceived effectiveness also tracked almost one-to-one.

Each motivational statement was ranked by volunteers on a five-point scale from “very dissatisfied” to “very satisfied.” Statements with scores closer to 5.00 can be considered more satisfactory than those with a score closer to 1.00.

*Table 4. Reasons to Volunteer by Importance, Satisfaction, and Satisfaction by Perceived Effectiveness*

	Importance	Satisfaction			
		All	Perceived Effectiveness Score *		
		Total	Low	Medium	High
Giving back to my industry/profession	46%	4.48	4.22	4.50	4.66
Expanding my professional network	11%	4.38	4.21	4.38	4.53
Playing a larger role in legislative, regulatory & professional advocacy	10%	3.90	3.70	3.83	4.10
Increasing my personal visibility/advancing my career	9%	4.20	3.99	4.16	4.39
Improving my technical knowledge regarding the industry/profession	8%	4.20	3.99	4.18	4.38
Developing my leadership skills	6%	4.19	3.98	4.16	4.38
Gaining deeper access to industry/professional information	5%	4.16	3.93	4.14	4.35
Other qualities	3%	3.89	3.57	3.79	4.16
Business development	1%	3.65	3.34	3.59	3.83

\* The effectiveness score is an aggregate representation of the effectiveness rating discussed above. Source Volunteer Experience Survey: What are the three most important reasons you are or were involved as a volunteer? How satisfied are you with your overall volunteer “career”? Please rate on a scale from 1-Very dissatisfied to 5-Very satisfied.

**Table 5. Satisfaction With Volunteer Experience Overall and by Perceived Effectiveness**

	Satisfaction			
	All	Perceived Effectiveness Score *		
	Total	Low	Medium	High
Overall volunteer experience	4.32	3.94	4.30	4.59

\* The effectiveness score is an aggregate representation of the effectiveness rating discussed above. Source Volunteer Experience Survey: How satisfied are you with your overall volunteer "career"? Please rate on a scale from 1-Very dissatisfied to 5-Very satisfied.

At the organizational level, volunteers ranked the importance of their association's volunteer management system features, with well-designed volunteer roles that make a meaningful contribution as key.

**Table 6. Elements of an Association Volunteer Management System Ranked by Highest Importance**

	Weighted Importance
Offers well-designed volunteer roles which provide opportunities to make a meaningful contribution to the industry/profession	41%
Attracts the best people in our field to volunteer	29%
Chooses diverse volunteers who represent varied professional backgrounds, demographics, and types of companies/work settings	25%
Has an open volunteer nomination process: anyone can be considered	21%
Has an effective volunteer selection process: gets volunteers into roles well-suited to their interests, experience, and abilities	18%
Provides effective succession for leadership roles, ensuring an open door to the next generation of our volunteers	16%
Provides useful resources which help me succeed in my volunteer role(s)	14%
Provides appropriate training as needed to help me succeed in my volunteer role(s)	13%
Provides effective orientation/introduction to my volunteer role(s)	11%
Recognizes/rewards effective volunteer performance	8%
Provides meaningful feedback regarding my performance	3%

Source Volunteer Experience Survey: Which are the three most important elements of the association's volunteer system for you regardless of how well it is performing in that area? (Rank number one most important to third most important).

The high importance of the element “well-designed volunteer roles which provide opportunities to make a meaningful contribution to the industry/profession” meshes well with the primary motivation of “giving back to my industry/profession.” One might also make the case that a well-designed role fits the volunteer “as-is,” without a substantial training requirement, and results in a higher likelihood of success and/or effectiveness. To that point, and as was the case in the staff survey results, volunteer training and assessment ranked at or near the bottom of their hierarchy. This does not necessarily indicate

the value of training and assessment—merely that they are placed lower in importance. It is worth noting again that as association volunteers generally rated their work effective, it could be expected that they place the need for training and assessment low given the good “fit.”

When comparing various characteristics of their association’s volunteer management system, staff and volunteers again shared a similar perspective and hierarchy.

*Table 7. Association Volunteer Management Features: Strengths and Weaknesses Net Change and Satisfaction*

Staff-Perceived Strength to Weakness	Strength Percentage	Net Change	Volunteers Satisfaction (Very or Somewhat)	Combined Percentage/Top 2 Box
Volunteer schedule and time requirements are within reason	73%	+60	Reasonableness of the time commitment required of me and my peers	78%
High, strategic importance of volunteer work that makes service more appealing	66%	+52	Extent to which the organization provides volunteer experiences that motivate me and make me want to stay engaged	68%

*Data presented are approximated and represent combined percentage of responses that are “strongly agree or somewhat agree” or “very satisfied or somewhat satisfied.” Source Association Staff Survey: In your opinion, which of the following do you regard as a strength or weakness of your volunteer system? Source Volunteer Experience Survey: How satisfied are you with the following attributes of the affiliate’s volunteer system? Please rate on a scale from 1-Very dissatisfied to 5-Very satisfied).*



**Table 8. Association Volunteer Management Features: Strengths and Weaknesses Net Change and Performance**

Staff	Strength Percentage	Net Change	Volunteer Well-Done Performance (Strongly or somewhat agree)	Combined Percentage/Top 2 Box
Committee/leadership roles that rotate either voluntarily or through bylaws	66%	+49	Provides effective succession for leadership roles, ensuring an open door to the next generation of our volunteers	52%
Volunteers who are representative and diverse (e.g., geographic location, demographics, business, or professional characteristics)	56%	+33	Chooses diverse volunteers who represent varied professional backgrounds, demographics, and types of companies/work settings	62%
Recognition, visibility, and prestige of volunteers and/or volunteer work that makes service more appealing	53%	+29	Recognizes/rewards effective volunteer performance	55%
Term limits that ensure new volunteers are engaged	44%	+12	Provides effective succession for leadership roles, ensuring an open door to the next generation of our volunteers	52%
Volunteer selection that is based on an objective assessment of qualifications/experience	40%	+9	Has an effective volunteer selection process: gets volunteers into roles well-suited to their interests, experience, and abilities	59%
Volunteer orientation that is effective	31%	-12	Provides effective orientation/introduction to my volunteer role(s)	56%
Training and development for volunteers that is effective	29%	-14	Provides appropriate training as needed to help me succeed in my volunteer role(s)	54%

*\*Data presented are approximated and represent combined percentage of responses that are "strongly agree or somewhat agree" or "very satisfied or somewhat satisfied." Source Association Staff Survey: In your opinion, which of the following do you regard as a strength or weakness of your volunteer system?; Source Volunteer Experience Survey: How well does the affiliate's volunteer system perform, based on your observations and experiences? Please rate on a scale from 1-Strongly disagree to 5-Strongly agree.*

Looking at Assessment

Of the respondents in the staff survey who indicated that their association conducts a formal assessment of volunteers, just under half (47 percent) assess all three types investigated (individuals, leaders, and groups), 21 percent assess two of the three, and 32 percent assess only one of the three. More formally assess groups (52 percent) than leaders (41 percent) or individual volunteers (36 percent). In the volunteer survey, only one in 10 (11 percent) indicated that their association uses a formal assessment process for volunteers.

In the case of individual volunteers and volunteer groups, we asked respondents of both the staff and volunteer surveys to identify the

attributes assessed. Results show staff and volunteers indicated roughly the same hierarchy of attributes. Overall, both staff and volunteers generally value execution, achievement of key goals, and meaningful participation.

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Table 9. Performance Attributes of Volunteer Leaders, Individuals, and Groups Formally Assessed by Associations: Instances of Occurrence and Perceived Importance

	Staff Measure	Volunteer Importance*
Volunteer Leaders		
Leaders ensure that their group adheres to/advances our organization’s strategic goals	32%	95%
Leaders ensure their group completes its work within planned budgets and timelines	28%	95%
Leaders are effective and well-regarded for the quality of their leadership	27%	97%
Group members express satisfaction with the quality of the group’s leadership	24%	88%
Leaders are well-liked by individual volunteers	17%	79%
Leaders are objective	16%	95%
Individual Volunteers		
Volunteers contribute ideas/suggestions that advance the group’s goals	27%	96%
Volunteers complete their tasks as assigned	27%	97%
Volunteers participate in a timely manner	26%	96%
Volunteers collaborate well with other volunteers	26%	96%
Volunteers prepare in advance of meetings/assignments	20%	93%
Volunteers ask appropriate questions	20%	93%
Volunteer Groups		
Group adheres to/advances the organization’s strategic goals	45%	96%
Group achieves goals within planned budget and timeline	38%	95%

\*Data presented are approximated and represent combined percentage of responses that are “very important or somewhat important.” Source Association Staff Survey: Which of the following qualities does your organization measure when formally assessing/evaluating the performance of individual volunteers and their groups? Source Volunteer Experience Survey: In your opinion, how important are the following attributes for effective volunteers? Please rate on a scale from 1-Not at all important to 5-Very important.

## Recommendations

The journey to a mutually beneficial volunteer system that supports the association's mission and members can take many paths. This research provides guidance knowing that for most associations this is both a new and urgent journey.

Like its predecessor, *Mutually Beneficial Volunteerism*, this report captures a snapshot of associations' actions in a point of time. In

many ways it is looking backward. An important goal of this project is to look forward and offer—through the lenses of our Research Advisory Council and *ASAE ForesightWorks*—recommendations for associations seeking to level up their volunteer systems. This section of the report offers a collection of options for associations that all point to the urgency to examine our volunteer programs as a first step.

“The volunteer role in our organizations is critical, and much more focus needs to be put on it. We must make it a priority, and we haven’t done that yet in the association space.”

— RAC volunteer

## Trends Affecting Volunteer Systems

Several critical trends are affecting volunteering. The *ASAE ForesightWorks* driver of change **Volunteering** captures two salient points:

- The aging and retirement of a large percentage of older workers will lead to the hollowing out of institutional knowledge of organizations that rely on these older workers serving in volunteer capacities.
- The rise of new business models—for instance, distributed networks of ad hoc teams instead of traditional hierarchies—will pose a challenge to established volunteering models. Younger volunteers using social media and online tools will be more inclined to organize from the bottom up and avoid working through an organization's centralized hierarchy.

While it is not the intent here to focus on trends potentially affecting associations, it is important for associations to consider additional trends and drivers of change as potential disruptors for volunteering. *ASAE ForesightWorks'* drivers include the following.

**Diversity and Inclusion:** The necessity to make inclusion a strategic priority in our volunteer systems as we engage generations who are increasingly more diverse. It will likely be that associations need to consider that they (like other American workplaces) could become a new ground zero for cultural divisiveness.

**New Forms of Work:** Freelance, gig, contract and temporary work, and the infrastructure to support them are growing. Fewer careers will move upward on straight paths, with more taking fluid courses. Likely impacts include availability and access for volunteering as well as an increasing expectation for similar shifts in volunteering.

**Re-Working Career Pathways:** Careers for life may begin to give way to careers for life stage” as workers and employers realize that time in a job or industry is a finite thing due to changing skills, interests, technologies, and market needs. Current volunteer systems largely follow career paths and view new professionals as young and experienced rather than experienced professionals in a new role. And those transitioning to a profession may find it difficult or not know how to volunteer if the structure continues to be rigid.

### What is ASAE ForesightWorks?

*ASAE ForesightWorks* is a deliberate, evidence-based research initiative and emerging line of products designed to help associations in environmental scanning and planning for change. The program provides associations with a continual stream of intelligence about anticipated trends, tools to help with the use of strategic intelligence in work, and opportunities to engage.

The program's mission is to empower associations to create a culture of foresight—not only by providing major trend analyses, but also by giving associations and their volunteer leaders the tools and processes to practice scanning.

To learn why associations need to practice foresight, visit [asaecenter.org/resources/asae-foresightworks](https://asaecenter.org/resources/asae-foresightworks).

### ASAE ForesightWorks Drivers of Change: Demographics and Membership

The people associations need to attract as both members and employees—and the people the industry will need to engage if it is to continue to thrive—are more diverse than ever across every demographic category. At the same time, how people connect and support each other is also shifting. Drivers of change—like **Volunteering**—explore how these shifts will affect the workforce and association membership in the years ahead.

#### Volunteering

Cultural, demographic, and technological changes are altering volunteer expectations and experiences in an increasingly dynamic and digital organizational environment. Associations and nonprofits are experimenting with more flexible roles and structures to support collaboration and contribution.

### ASAE ForesightWorks Drivers of Change: Workforce and Workplace

Technological advances and changing workplace needs are shaping the future of work. Changes are anticipated across numerous industries, creating new workplace structures, new competencies for organizational success, and new learning and skill development demands for workers. Drivers of change—like **Diversity, Equity, and Inclusion, New Forms of Work, and Re-Working Career Pathways**—connect shifts in the world of work to opportunities and challenges for associations.

#### Diversity, Equity, and Inclusion

American society and workplaces will continue to grow more diverse, equitable, and inclusive as values evolve and younger generations increase their share in the demographic mix. This will occur against a backdrop of social and political polarization—with the workplace as a primary arena in which contending views collide and issues are worked out. To meet these challenges, inclusion and equity efforts should be treated as a systemic priority, supported by a new generation of tools and processes.

#### New Forms of Work

Freelance, gig, contract, and temporary work and the infrastructure to support them (e.g., online platforms and reputation systems) are growing. Many employers view these non-permanent workers as relatively disposable, and offer them lower levels of benefits and pay. However, firms are becoming increasingly reliant on flexible workers, and growing numbers of independent professionals are joining the flexible workforce. Associations will have new opportunities to serve these workers and advocate for their interests.

#### Re-Working Career Pathways

The idea that the course of people's professional lives is settled in their twenties is long-outmoded, but employers and life structures have been slow to adapt to this fact. However, organizations are increasingly assisting workers with midlife transitions, such as going back to school, enhancing skills for new career directions, or allowing for reduced hours so that employees can pursue other interests. Such steps create a need to rethink work, education, and social safety nets to accommodate new approaches.

## Reimagining The Volunteer System

Top of mind for the Research Advisory Council members was how to take advantage of the demographic shifts, new workplace, and challenges of rapid acceleration of change through its volunteer systems. They accepted the role of translating the research findings into strategic insights and recommendations for taking action.

It is true that there is no one size fits all when it comes to how associations organize themselves to drive their mission—we have great variance in governance, volunteer, and staff models.

The research, however, points us to practices and strategies that can both improve our volunteering systems as well as optimize them to better position associations for the future.

Among the recommendations coming from the research are three courses of action that associations might pursue:

**1** Characteristics of Excellence for an Effective Volunteer Model—adopting a framework for pursuing excellence

**2** Process Model for Developing an Effective Volunteer Model—following a systematic approach of system assessment and modeling

**3** Volunteer Impact Framework—considering objective metrics for your volunteer system

“We are called to approach this conversation where we are individually. We must build for sustainability and so we should begin by identifying one to two things we can do now and maintain over time. Just start.”

— RAC volunteer

## Characteristics of Excellence for an Association Volunteer Model

These principles support and sustain mutually beneficial volunteer involvement in the mission and work of our associations and are those seen in associations that generally rate their volunteers as effective.

The principles should be viewed in part as aspirational, for several factors influence an association's ability to address one or more of the principles. It may be useful to consider the “10 Organizational Factors and Strategic Implications” from *Recruit the Right Board: Proven Processes for Selecting Critical Competencies* (ASAE Foundation, 2019) in helping you calibrate this list.

Association leaders may also find that at any given point in time, they perform better or worse on one or more of the elements, as associations are in constant flux.

A reader should not assume that each characteristic is always equal in weight, for they affect volunteer management at different levels. Collectively these provide an inventory against which an association can identify possible areas for improvement to maximize their use of volunteer time and talent.

This list itself is subject to change: As the world in which associations operate evolves, so should our metrics and strategies

*Table 10. Characteristics of Excellence for an Association Volunteer Model*

<b>Organizational culture of volunteerism</b>	Creating a culture of volunteerism within the organization—among both members and staff—that embraces volunteerism while also providing necessary resources to meet the needs of the organization, the staff, and the member volunteers and to ensure the association is balancing appropriate legal and operational authority between volunteers and staff.
<b>Clarity of purpose and definition of high performing</b>	Creating the organization's purpose statement for engaging volunteers, in which the organization clearly articulates the impact of a successful volunteer strategy.
<b>Holistic and transparent volunteer system infrastructure</b>	Embracing a holistic and transparent volunteer resources management system that addresses the six key elements of job design, recruitment and selection, orientation and training, management, assessment, and reward and recognition, and which is aligned with the organization's culture and systems.
<b>Commitment to continuous improvement</b>	Embedding into the volunteer system regular and ongoing assessment and modernization practices. This should consist of multiple approaches including a (1) system-wide assessment, (2) individual group and program assessments, (3) assessment of individual volunteer learning, satisfaction, readiness, and contribution, (4) stress tests for DEI, time to decision, and strategic focus, and (5) updating volunteer systems based on learnings of assessment. The intent is to identify and replicate successes, fill performance gaps, and collect relevant benchmarking data to support continuous improvement.
<b>Professional development</b>	Committing to ongoing learning for staff and volunteers about the profession/trade, nonprofit/association sector, relevant societal and social impact trends, and DEI.
<b>Staff readiness and preparedness</b>	Investing in ongoing training, development, and mentoring of staff to support and be partners with the association's volunteers.
<b>Information and knowledge transfer</b>	Enabling the transfer of necessary information, history, trends, and experiences as volunteers and staff change.
<b>Anticipatory capabilities and responsiveness</b>	Anticipating changes in the profession, association, and society within the context of volunteer management and adapting systems and learning in response.
<b>Resource commitment</b>	Investing in the volunteer strategy to continually evolve and innovate the systems including positively influencing how volunteers are able to complete their role.
<b>Community focus</b>	Committing to building and nurturing the community engaged in the work of the organization; this is about strengthening the personal and professional bonds across the community.
<b>Strong identification and connection to the profession or trade</b>	Tying the volunteering roles to influencing the profession, trade, or sector in a meaningful way.

### Developing an Effective Volunteer System: A Process Model

An association volunteer system is complex and often has parts dictated in the organization's bylaws. By walking through a systematic process, an association can at least fully assess its current model and set goals for areas of improvement. Likely there are short-term actions that can provide incremental improvement, such as revamping volunteer orientation and training, adding staff training on working with volunteers, or broadening volunteer recruitment to get beyond "familiarity" as the initial barrier to entry.

This model outlines key steps to undertake in considering an association's volunteer model. While the steps and principles apply across organizational structures (individual membership organization, trade association, etc.) and volunteer groups (boards, committees, etc.), there is room for individual associations to adapt as appropriate.

"Our volunteers aren't going to define what is the effective volunteer—that's our job. How do we [association] remain relevant? How does the 'effectiveness' contribute to or detract from the strategic plan? Thought leadership? Engagement? Relationships: Are volunteers and staff working collaboratively? This is our role as the SME on associations."

— RAC volunteer



*Figure 1. Developing an Effective Volunteer System: A Process Model*

**1** Define your organization's philosophy of volunteer involvement to reflect your volunteer purpose statement and capture the values guiding your engagement of volunteers. In the c3 sector this is referred to as the "foundation of a volunteer program," as it captures why volunteers are a strategic human resource for your association. This philosophy guides how an association determines how to best use volunteer involvement. This volunteer purpose statement should align with your organization's value statements.

**2** Identify the desired outcomes for the association's volunteer system. This is where the association defines an effective volunteer program and volunteers based on those outcomes. Here is where an association can then identify the metrics that would objectively measure the actual impact. There are three common areas to consider, each of which is explored in more detail in Volunteer Impact Template below:

**Volunteer outcomes**  
(e.g., professional benefits, personal benefits)

**Organizational outcomes**  
(e.g., operational capacity or capability, external affairs, community or member engagement)

**Member outcomes**  
(e.g., services/products, awareness, contribution)

**3** Assess the current system based on outcomes desired using the metrics identified. One tool to consider is the MBVS Assessment model used in the 2017 *Mutually Beneficial Volunteerism* research project. It is a survey of both staff and volunteers that provides a view of the system based on the experience and perception of the key stakeholders. Alternatively, or in conjunction with that assessment, an association should explore key questions that affect the effectiveness based on research and practice.

#### Exploratory questionss

##### Building volunteer capacity

- Are we successfully engaging the right volunteers for the organization, considering volunteer diversity, and meeting the competency needs of the association?
- Are we filling the necessary positions?
- Do we have a diverse, abundant pipeline of volunteers and future leaders?

##### Enhancing the volunteer-staff partnership and experience

- Are we supporting volunteers and staff to have effective relationships and the best experience?
- Are we making effective use of volunteer and staff time?

##### Committing to continuous improvement

- Are we intentionally assessing our volunteer internal management, volunteer experience, and volunteer outcomes?
- Are we monitoring how the organization's needs for volunteerism are changing over time and organizational lifecycle?
- Do we have risk mitigation strategies?

##### Volunteer performance

- What is the "time to decision" of your groups; are we making timely decisions?
- What is the effectiveness of decision making by volunteers?
- Are strategic groups acting at a strategic level?

**4** Build out or re-design the volunteer system based on the MBVS Volunteer Resource Management model. This may well be the most complicated of the steps, and associations will approach this based on resources and capacity. The four elements that associations would be best served to focus the system on are

Provide open access by offering a variety of volunteer opportunities (length of commitment, virtual, etc.).

Make best use of volunteer and staff time.

Recognize unconscious bias in job design, recruitment, and selection.

Develop an appropriate assessment process to provide feedback on the organization performance and value of the volunteer system.

Volunteer Impact Framework: A Model for Viewing Effectiveness

The research makes the case for defining relevant metrics for an association volunteer system, though it does not specify metrics. That is natural, as associations vary in many ways from size and scope to mission and purpose. The intent then is to provide associations a look at potential metrics that they might consider. The examples offered here are not for all associations, nor would associations necessarily use all. Each association should begin with its organizational goals and then determine the role of its volunteer program in achieving these.

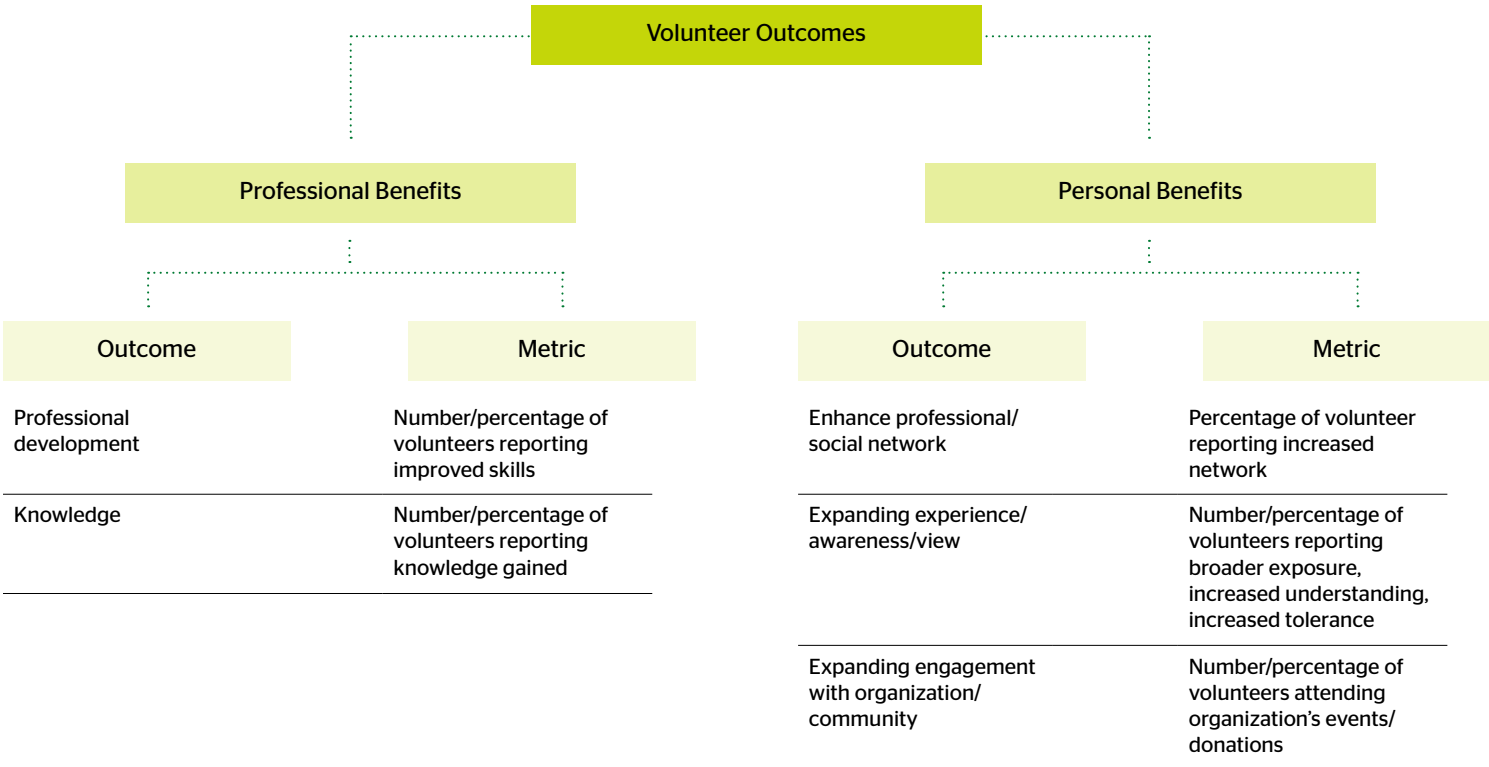
This is designed as a template to provide examples of desired outcomes and potential metrics for measuring achievement of those outcomes. In adapting this template to develop its volunteer system’s metrics, associations should use its strategic goals and organizational metrics as the starting point.,

This draft framework is adapted from: [Making It Count: How to Measure the Impact of Volunteerism, Starbucks and Mission Measurement, 2011](#). It draws on two additional resources: [Measuring the Impact of Volunteers: A Balanced & Strategic Approach, Energize, 2016](#) and [Value of Volunteering Wheel, Volunteer Canada](#).

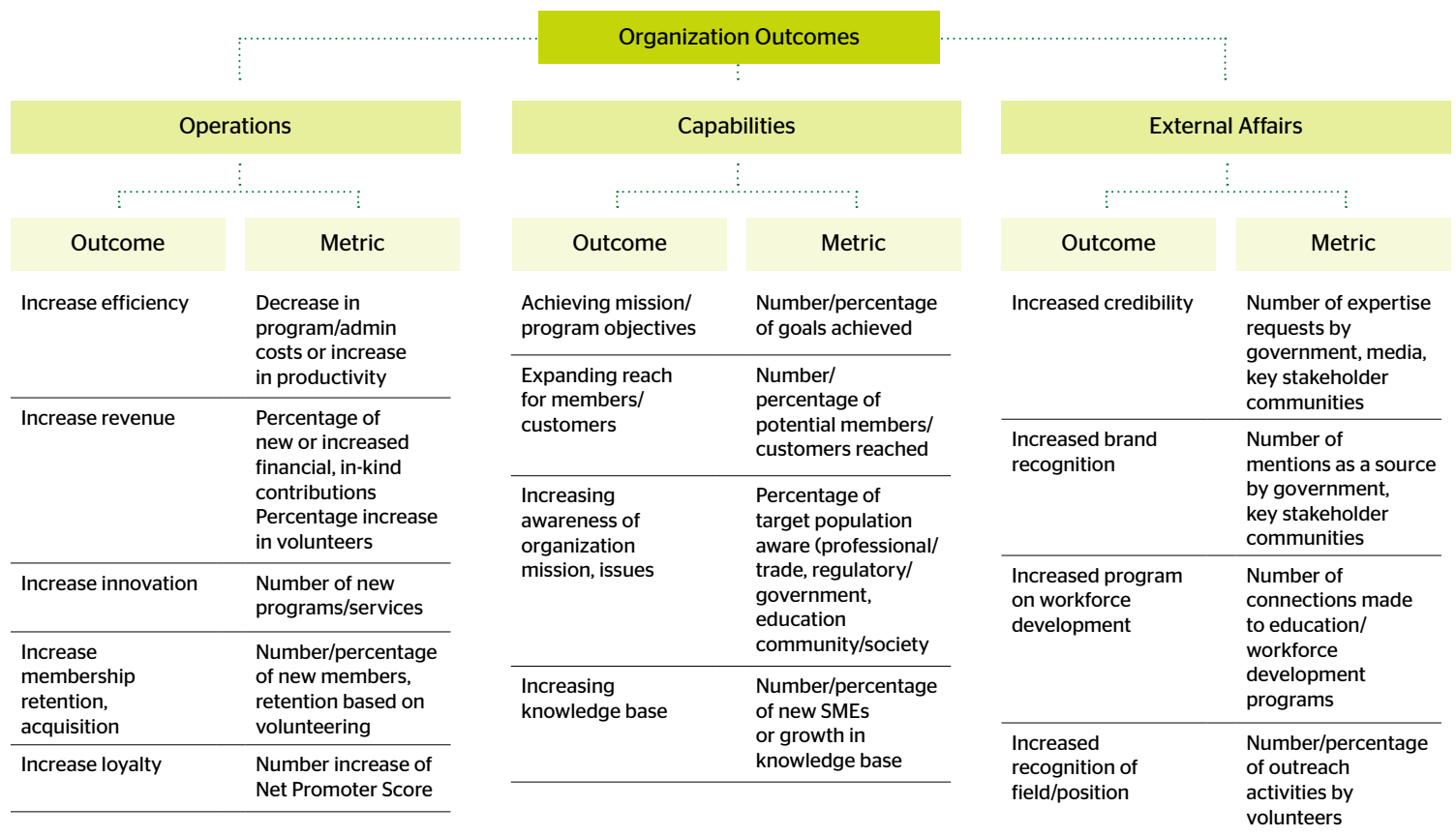
There are three possible focus areas, each with a number of optional categories, offered here:

- 1 Volunteer outcomes: professional and personal benefits
- 2 Organizational outcomes: operations, capabilities, external affairs
- 3 Member outcomes: membership benefits; note that member is used broadly to reference all programs and services provided to members, customers, and key stakeholders as part of a value proposition.

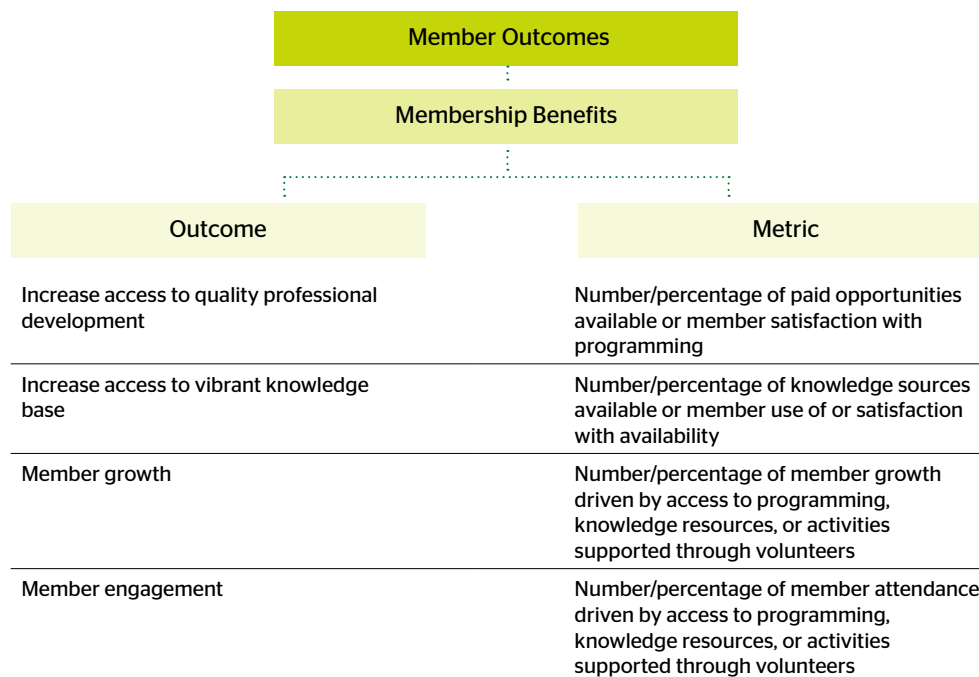
Figure 2. Volunteer Impact Template: Volunteer Outcomes



**Figure 3. Volunteer Impact Template: Organization Outcomes**



**Figure 4. Volunteer Impact Template: Member Outcomes**



## Individual Interviews and Focus Groups

For the qualitative study of the “Holistic Approach to Association Volunteer Management” research project, we conducted in-depth interviews and focus groups of association professionals to establish a foundation for the subsequent studies (association staff survey and volunteer survey, which were built on the themes identified in the individual interviews and focus groups.

### Individual Interviews

The interviews were designed to achieve the following:

- Determine how volunteers contribute to achieving the association’s mission.
- Collect staff perceptions of individual and group volunteer effectiveness.
- Document the extent to which volunteer structures and management models achieved desired outcomes.

### Summary

Thirty association professionals participated in interviews conducted between August and October 2021, with interviews lasting on average 30–45 minutes. Individuals included in the interviews represented a range of working relationships with volunteers. Additionally, associations included in the interview pool covered the full range of association types and sizes. Profile information reported by the individuals during a prescreening process can be found in the appendices.

The interviews included inquiries about assessment tools, metrics, and other mechanisms for assessing volunteer performance. They also explored what, if anything, staff and volunteers do with the evaluations.

## Findings

### Current Volunteer Management

Volunteer strategy—from recruitment, nomination, and selection to volunteer support and systems—takes many shapes and forms. The process is often driven by, and contributes to, the association’s culture. Few associations have a comprehensive approach to volunteers, and groups are often managed individually. This led to a number of participants sharing that there was a challenge in creating consistency in the volunteer experience. For those with geographic components, approaches to managing chapter leaders are typically different from managing other types of volunteers within their organization.

Efforts to connect the work of volunteers to the organization’s strategic plan are mixed, though most indicated that doing so was important. In fact, the most common volunteer roles focus on providing profession or industry expertise—for example, serving as subject matter experts and assisting with environmental scanning and market intelligence, all of which can support a plan. While almost all spoke of attempts to create more flexibility in the system to engage members in this work, progress is mixed.

Most agreed that the volunteer management system can affect positive volunteer experience. Most frequently mentioned are

- Developing and nurturing strong staff-volunteer relationships
- Establishing roles with clear purpose and relevant meaning
- Setting clear expectations.

### Volunteering as Engagement

Volunteer opportunities are viewed as mechanisms for member engagement, and volunteer assessment is often conflated with member engagement scoring. A common related theme is a long-standing focus on volunteer diversity, which has gained increased attention and urgency in the last 18 months as a visible door to expanding diversity across membership.

When asked about the impact of COVID on volunteer engagement, the comments were mixed. COVID shifted many volunteer activities to virtual, which has had positive and negative impacts on volunteer performance. Some associations reported that volunteers are burnt out; this is not universal.

### Volunteer Assessment and Effectiveness

Association staff recognize that assessments are part of volunteer management, but they are not acting on those imperatives. They reported having informal mechanisms for assessing volunteers and rely on qualitative measures more so than hard metrics such as staff or other volunteer perceptions or instincts or feelings of a volunteer.

When measures in place, they are often checklists or activity reports, which often flow to the board. The focus, however, is more on building awareness or activity rather than assessment. Volunteers serving in technical roles and those providing subject matter expertise are easier to assess than those serving in governance roles.

Participants largely pointed to volunteer-to-volunteer assessment as a common approach to accountability.

## Conclusions

This phase of the research was designed to support the development of the field research. Key points for the research going forward:

- 1 As a whole, there is not a comprehensive approach to volunteering, although there is interest in that.
- 2 There is a perceived connection between volunteers and engagement, but understanding or measurement is limited.
- 3 There is a deep interest in exploring models, tools, and processes to address challenges in engaging volunteers.

“Volunteerism is not well-considered within organizations. From recruiting to assessing to considering what volunteers need to achieve. Committees without purpose are the greatest issue we face.”

— Focus group participant

## Focus Groups

For the second phase of the “Holistic Approach to Association Volunteer Management” research project, we convened seven focus group discussions with association professionals to build on the themes identified in the individual interviews and inform the subsequent quantitative surveys. The focus groups were designed to achieve the following:

- Generate a working definition, or definitions, of an effective volunteer.
- Obtain group reflection on the definitions of volunteer effectiveness at the individual and group levels.
- Explore staff perceptions about volunteer effectiveness and volunteer strategy.

## Summary

Fifty-six association professionals participated in the groups conducted via Zoom in September and October 2021. Collectively, the group represented the full range of associations by type, size, and location as well as a broad range of staff positions and working relationships with volunteers. One group was composed entirely of component relations staff. Participant profile statistics are included in the appendices.

The focus groups included inquiries about formal and informal volunteer assessment, organizational support for volunteers, and the importance of volunteers regardless of effectiveness. Additionally, the sessions sought to identify specific cases and sample tools that can be potentially used as models.

## Findings

### Current Volunteer Management Models

There is a general sense that the traditional volunteer management model is outdated and limiting. This drives a desire to learn about alternatives and emerging trends. While organizations view volunteers as fundamentally important, they report that volunteer systems and structures are poorly defined, resourced, and rarely evaluated. Largely, there is little investment in training for staff as volunteer managers or volunteers beyond orientation and onboarding. This last point is a source of weakness and contributes to less effective volunteer outcomes and lower volunteer satisfaction according to participants.

While approaches varied, there is consensus that the staff-volunteer relationship is critical to success. Based on the focused discussion on components, there is a fundamental difference in the operation, support, and evaluation of volunteer systems in chapters and state and regional components versus national-level volunteers.

### Defining Effectiveness

There was no clear measurable definition for *effectiveness*, based on the participants' comments. They can generally describe an effective volunteer or group but don't rigorously assess or evaluate volunteers. At best, they track volunteer-related activity. Written documentation of negative volunteer evaluations is generally shunned, with the widespread use of informal, qualitative assessments used instead. When negative or disciplinary volunteer communication needs to be delivered, it is accomplished through member-to-member communication.

## Detailed Findings

A substitute for the definition of effectiveness appears to be engagement. When pressed, participants defined engagement in terms of showing up, being prepared, contributing, and meeting deadlines, goals, etc. Clearly, further exploration is needed to define engagement.

The closing question was, regardless of effectiveness, would you replace volunteers with paid staff? We asked this to better understand how association personnel view volunteers, why they might tolerate the ambiguity of whether an individual, group, or strategy was effective, and what value they place on volunteers. Overwhelmingly, the response was a resounding no, they would not replace volunteers. Nearly everyone articulated that volunteers are the lifeblood of the association and are central to the organization's reason for existence. Among comments:

- Simply engaging volunteers is important.
- “You can’t buy community.”
- The absence of volunteer opportunities diminishes member value.
- Volunteers are critical for advocacy and grassroots communication.
- Volunteers are critical for industry/profession knowledge

## Conclusions

This phase of the research was designed to support the development of the field research. Key points for the research going forward:

- 1 As a whole, the association community does not have a shared definition for effectiveness and in fact may have some reluctance to aspects of measuring effectiveness, namely evaluating individual volunteers.
- 2 One measure of effectiveness appears to center on the value of engagement; therefore, further exploring that connection and how it may be used as a measure will need more study.
- 3 Areas in which participants would like more study include non-traditional models, selection processes, and scaling volunteer systems based on association size.

## Association Staff Survey

The association staff survey was one of two key quantitative data collections in the overall research project. This survey was used to measure the structure and performance of volunteer systems and identify a pool of associations willing to participate in a second-phase survey to be conducted among their volunteers (241 expressed some interest).

## Methodology

A survey was administered by the ASAE Research Foundation among a universe of ASAE-member association CEOs, chapter relations professionals, and volunteer and member engagement professionals. One survey was sent per organization. However, if a chapter relations professional was identified, two surveys may have been sent to garner both the organizational view and chapter view of volunteerism. Several messages were sent to encourage them to respond. A total of 661 surveys were submitted with usable data, for a participation rate of approximately 10.8 percent. Respondents are relatively diverse in terms of budget, structure, scope, total membership, staff, geographic location, and industry. A profile of respondents can be found in the appendices.

## Findings

### Activities Organizations Currently Engage in to Manage Volunteers

Assigning a board liaison for committees is the most common method reported by associations to manage their volunteers—53 percent report that they always do this, while about 15 percent each do so often or sometimes, with an average score of 3.1 on a 4-point scale.

Several other activities that are relatively common but with fewer who always do it include sending a direct invitation to all members periodically to encourage volunteering (average score of 2.9) and having strong cross-departmental coordination among staff who manage the work of volunteers (2.8).

A systematic workplan to align activities of committees and volunteers to organizational priorities (2.75), providing an orientation process for new and other interested volunteers (2.65), a specific staff member or department responsible for overall volunteer coordination and management (2.55), and some reserved seats on the board to ensure full representation of membership segments such as by demographics, region, areas of specialty, or company size (2.51) are reported by many associations.

Training programs to provide volunteers skills needed to fulfill their role (2.2) and for staff to manage volunteers (1.85) and evaluation processes to measure the quality of a volunteer's experience (1.75) and the quality of a volunteer's work output (1.55) are the least-used methods to manage volunteers today.



**Figure 5. Activities Associations Employ to Manage Volunteers**



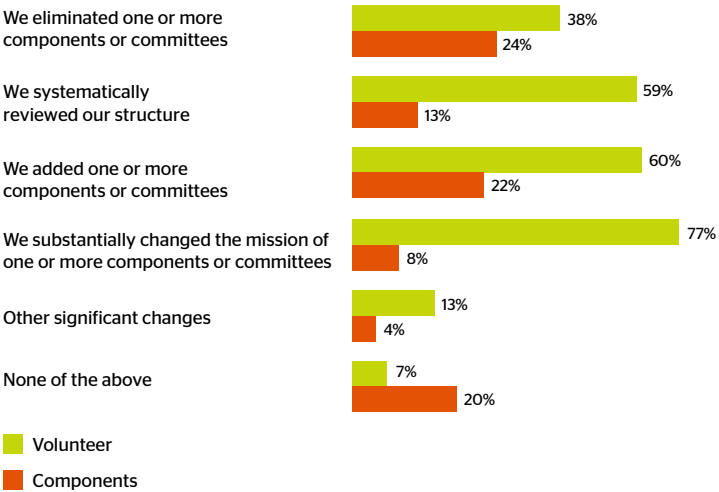
Source Association Staff Survey: Does your organization engage in the following activities to manage your volunteers? Please rate on a scale 1-Never, 2-Sometimes, 3-Often, or 4-Always. If unsure, select Unsure/NA.

Recent Changes: Volunteer and Component Structures

Survey participants report substantial changes over a five-year period between 2017 and 2021.

- **Components**—Although a substantial number of associations report that they do not have chapters (48 percent) or special-interest groups (28 percent), almost one fourth have eliminated one or more components (24 percent), added one or more (22 percent), systematically reviewed their component structure (13 percent), substantially changed the mission of one or more components (8 percent), or made other significant changes (4 percent). Another 20 percent indicated engaging in none of these actions.
- **Volunteers and committees**—The largest proportion of associations (77 percent) substantially changed the mission of one or more committees. Similar proportions systematically reviewed their volunteer structure (59 percent) and added one or more committees (60 percent), while fewer eliminated one or more committees (38 percent) or made other significant changes (13 percent). Only 7 percent of them report engaging in none of these actions.

Figure 6. Changes During 2017–2021 to Volunteer and Component Structure



Source Association Staff Survey: Thinking back over the past year (January 2021–December 2021) enter the total number of volunteers, committees, and components per section. Where indicated, enter the average number of years. Feel free to approximate/estimate. If not applicable, leave blank.

Average Total Volunteers Engaged, by Role and Level

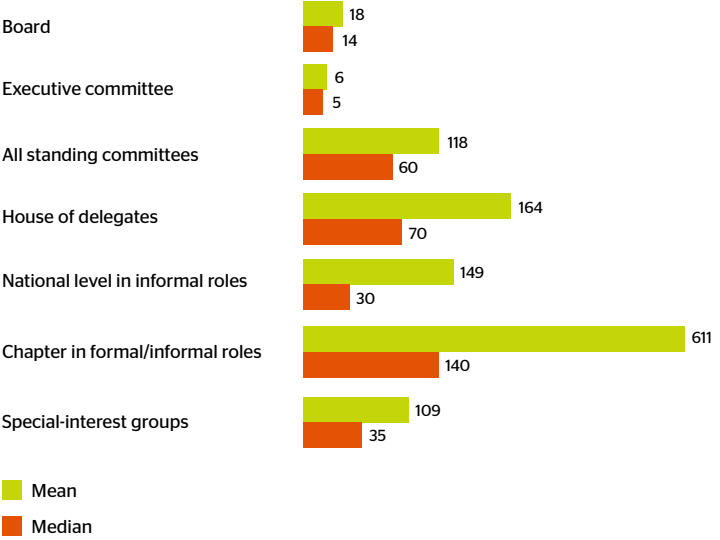
Survey participants report an average board size that has a mean of 18.5 and median of 14 individuals. The executive committee, reported by 89 percent of associations, has a mean of 5.9 members and median of 5.

A mean of 117 and median of 60 total individuals serve on all standing committees combined. For the 19 percent who report a house of delegates, a mean of 164 and median of 70 total individuals serve. Total involved at the national level in informal roles (estimated by 69 percent of associations) is a mean of 149 and median of 30 individuals.

At the component level, participants report a mean of 611 and median of 140 involved in informal or formal roles in chapters and a mean of 109 and median of 35 in special-interest groups. Given that many associations do not have them, and some face challenges in providing an estimate, only 35 percent and 30 percent, respectively, report figures for these two levels.

Combining all responses to these questions, associations report a mean of 514 and a median of 165 individual volunteers. This is a derived, unduplicated figure that probably does a considerable amount of double counting.

Figure 7. Average and Median Number of Volunteers (Per Specific Role) During 2017–2021



Source Association Staff Survey: Thinking back over the past year (January 2021–December 2021) enter the total number of volunteers, committees, and components per section. Where indicated, enter the average number of years. Feel free to approximate/estimate. If not applicable, leave blank.

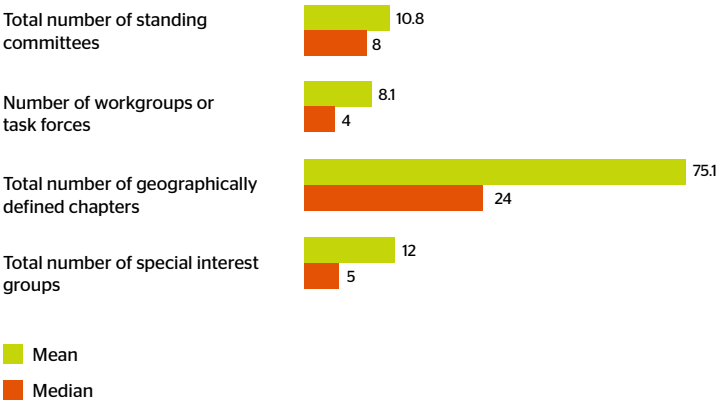
Detailed Findings

Average Total Structuress

Number of structures shows a mean of 10.8 and median of 8 standing committees and a mean of 8.1 and median of 4 task forces or workgroups. These were reported by 96 percent and 84 percent of associations, respectively.

The average association with geographically defined chapters reports a mean of 75.1 and median of 24, while those with special-interest groups have a mean of 12.5 and a median of 5. These structures are reported by only 36 percent and 31 percent, respectively.

Figure 8. Average and Median Number of Volunteer Groups (Per Role) During 2017–2021



Source Association Staff Survey: Thinking back over the past year (January 2021–December 2021) enter the total number of volunteers, committees, and components per section. Where indicated, enter the average number of years. Feel free to approximate/estimate. If not applicable, leave blank.

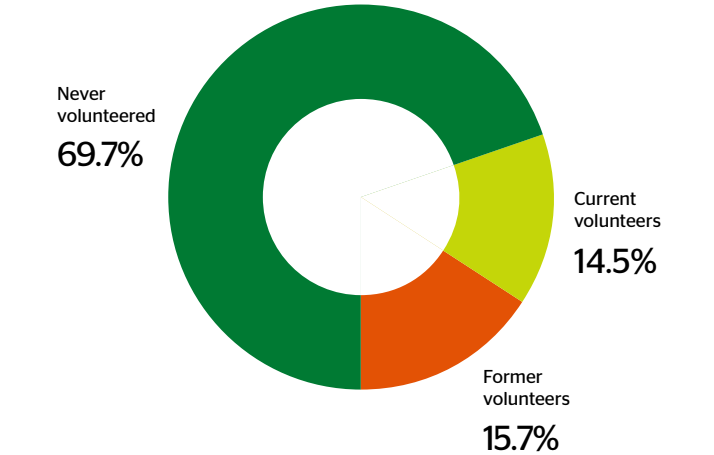
Percentage of Members Who Volunteer

When asked to estimate the proportion of their members who volunteered within the past 12 months or who volunteered previously, survey participants estimated similar proportions of 14.5 percent and 15.7 percent, respectively, and report that almost 70 percent of their members have never volunteered.

Other data from the survey suggest that this may over-report volunteer behavior, given that the ratio of total volunteers reported shows mean and median ratios of volunteers to total membership of 3.75 percent and 6.0 percent, respectively.

Another data point captured in the survey shows that leaders serve an estimated mean of 7.5 years and median of 5.0 years in volunteer roles prior to becoming board chair/president.

Figure 9. Percent of Current Membership as Current or Former Volunteers



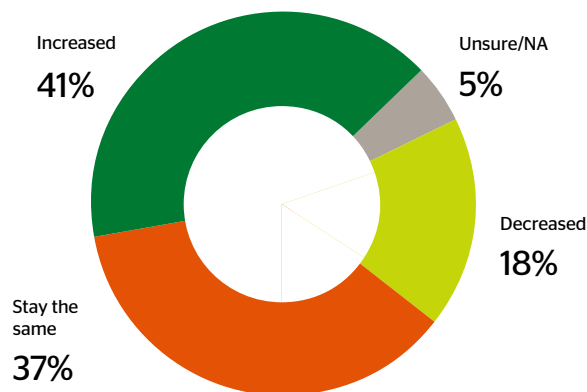
Source Association Staff Survey: What percent of your current membership would you estimate falls into each of these categories? Include everyone who served in any volunteer role in 2021. Feel free to approximate. Please answer so that your total adds up to 100%. Leave blank if not applicable.

## Detailed Findings

### Patterns in Total Volunteers

Volunteerism is on the rise within associations. While 41 percent report the total number those volunteering increased between 2017 and 2021, only 18 percent have reported a decrease, while 37 percent report that it has stayed the same.

**Figure 10 . Change in Total Number of Volunteers During 2017–2021**

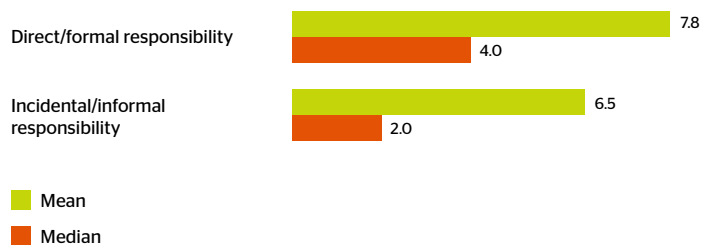


Source Association Staff Survey: Source Association Staff Survey: Over the past five years (2017–2021) have the total number of members who volunteer at any level increased, decreased, or stayed the same?

### Staff With Volunteer Management Responsibility

Participating associations estimate that a mean of 7.8 and a median of 4 staff have direct or formal responsibility for coordinating and managing the work and activities of the board and other volunteers. Another group of staff, a mean of 6.5 and median of 2, have incidental or informal responsibility.

**Figure 11. Average and Median Number of Staff with Volunteer Management or Coordination Responsibility During 2017–2021**



Source Association Staff Survey: Thinking back over the past year (January 2021–December 2021) enter the total number of staff with volunteer direct/formal and incidental/informal management or coordination responsibility.

### Estimated Time Coordinating or Managing the Work of Board and Other Volunteers

The time spent by these individuals collectively is estimated to be a mean of 16.4 percent of their overall workload if they have direct or formal responsibility and slightly less, a mean of 14.3 percent, if they have incidental or informal responsibility. The median for the latter group is considerably lower, at 10 percent, reflecting many associations reporting some staff in this area spend far less time in managing and coordinating the work of volunteers.

**Figure 12. Average and Median Percent of Staff Time Coordinating or Managing Volunteers During 2017–2021**



Source Association Staff Survey: Thinking back over the past year (January 2021–December 2021) estimate the percent of time coordinating/managing (direct/formal and incidental/informal) the work/activities of the Board/other volunteers.

Combining the mean responses for total staff and percentage of time spent implies a total of 2.2 FTEs work with volunteers, with 1.3 FTEs having direct or formal and 0.9 indirect or informal responsibility. Consequently, about 60 percent of staff time is spent by those who have the function written into their job descriptions, and about 40 percent of the time is spent with another, somewhat smaller group of staff who do it with less specific requirements.

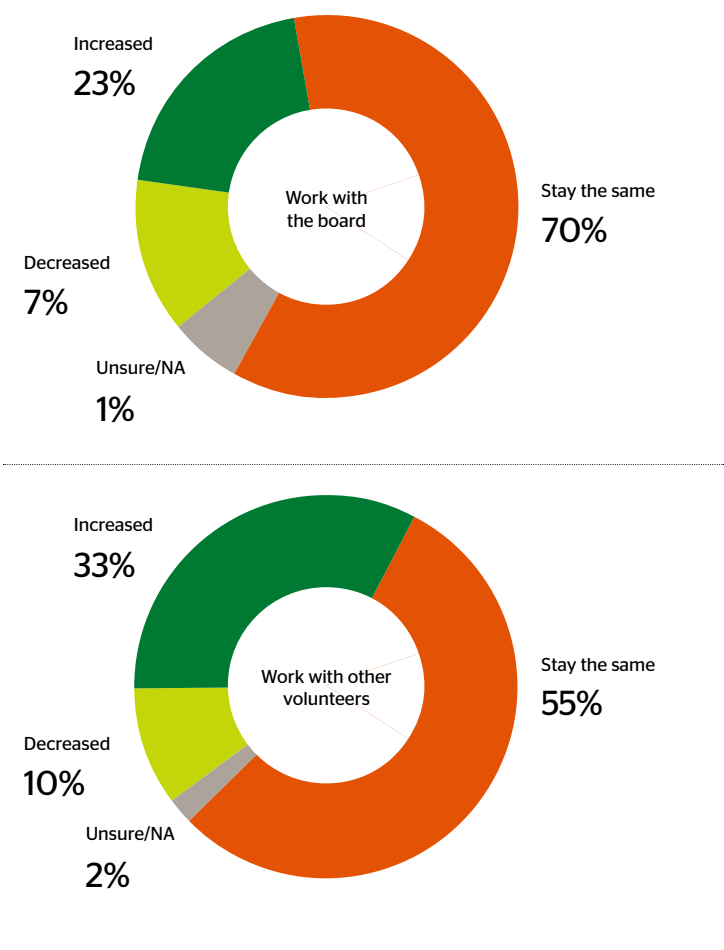
# Detailed Findings

## Patterns in Total Staff Working with Volunteers

As the number of volunteers increases, so too has the staff responsible for working with them over the past five years.

While the net number of associations reporting an increase in total volunteers was 23 percent (or 41 percent reporting an increase compared to 18 percent reporting a decrease). A similar net number was reported by associations for staff working with non-board volunteers (+23 percent, or 33 percent increasing and 10 percent decreasing), while a smaller net number report more staff working with the board at 16 percent (23 percent increasing and 7 percent decreasing). This commitment moves more slowly, as 70 percent of associations report staff working with the board and 55 percent report staff working with other volunteers has remained constant between 2017 and 2021.

Figure 13. Change in Total Number of Staff Working with Volunteers During 2017–2021

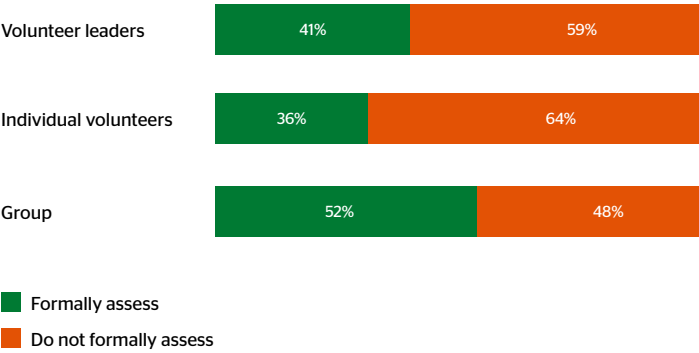


Source Association Staff Survey: Over the past five years (2017–2021) have the following increased, decreased, or stayed the same?

## Formal Assessment of Volunteerss

Formal assessment is done by at least half of participating associations at the group level, while just 41 percent evaluate volunteer leaders and 36 percent evaluate the individual volunteers.

Figure 14. Percent of Associations with a Formal Assessment of Volunteer Leaders, Individuals, and Groups



Source Association Staff Survey: Which of the following qualities does your organization measure when formally assessing/evaluating the performance of individual volunteers and their groups? Select all that apply.

# Detailed Findings

**Evaluation of leaders**—Associations are most likely to assess four key aspects of leader performance:

- Leaders ensure that their group adheres to or advances the organization’s strategic goals.
- Leaders ensure that their group completes its work within planned budgets and timelines.
- Leaders are effective and well-regarded for the quality of their leadership.
- Group members express satisfaction with the quality of the group’s leadership.

Each of these qualities was measured by between 32 percent and 24 percent of participating associations. Based on the number of associations that actually evaluate volunteers, this means that leaders are assessed in almost 80 percent of evaluations for their performance ensuring adherence to or advancement of strategic goals; in about two thirds they are assessed for group budget and timeline performance and being effective and well-regarded leaders; and in almost 60 percent, group members evaluate the quality of their leadership.

Two qualities assessed less often are how well-liked and objective their leaders are. About one sixth of associations overall assess these—that equals about 40 percent of those that evaluate leaders.

Figure 15. Volunteer Leader Qualities Measured Through a Formal Assessment

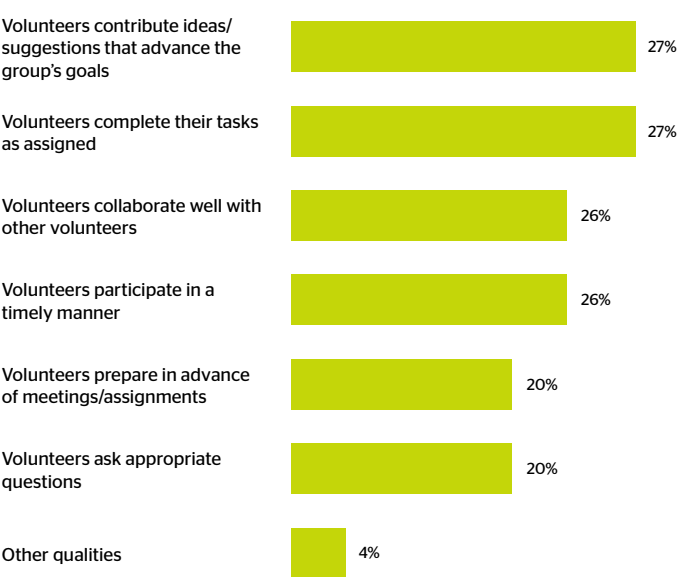


Source Association Staff Survey: Which of the following qualities does your organization measure when formally assessing/evaluating the performance of individual volunteers and their groups? Select all that apply.

**Evaluation of individual volunteers**—Just more than one fourth of participating associations evaluate individuals for contributing ideas or suggestions, completing their tasks as assigned, collaborating well with peers, and observing timeliness.

One fifth each assess them for advance preparation and asking appropriate questions. As a proportion of the 36 percent of associations that evaluate individuals, between 73 percent and 75 percent of their evaluations address the first four qualities, and 56 percent address the other two.

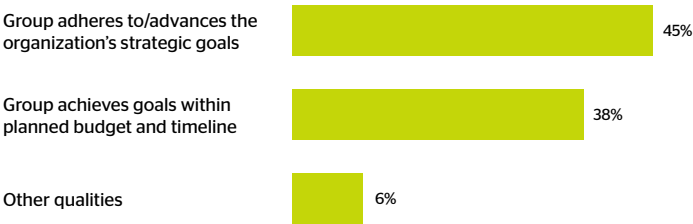
Figure 16. Individual Qualities Measured Through a Formal Assessment



Source Association Staff Survey: Which of the following qualities does your organization measure when formally assessing/evaluating the performance of individual volunteers and their groups? Select all that apply.

**Evaluation of groups**—Group evaluations are conducted by a higher proportion of associations. As a result, almost half of participating associations evaluate groups for adhering to and advancing the organization’s strategic goals and 38 percent evaluate groups for achieving goals within budget and timelines. This corresponds to 87 percent of evaluations covering adherence to or advancement of goals, and 72 percent of evaluations covering goal achievement within budget and timeline.

Figure 17. Volunteer Group Qualities Measured Through a Formal Assessment

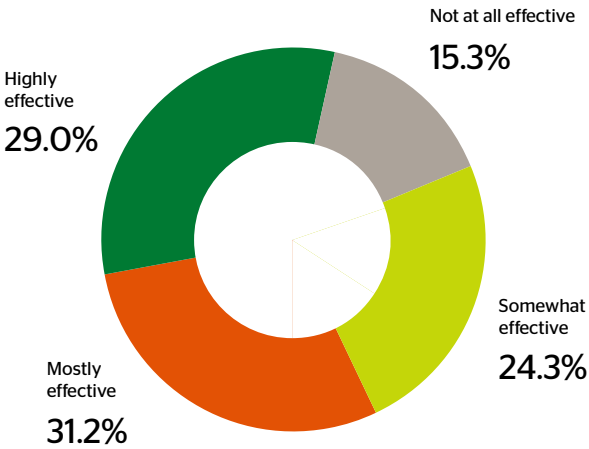


Source Association Staff Survey: Which of the following qualities does your organization measure when formally assessing/evaluating the performance of individual volunteers and their groups? Select all that apply.

Assessment of Overall Volunteer Performance

Participating associations estimated what percentage of their volunteers fell into each of four categories of performance. (The chart below presents the average percentage estimated for each cell, rather than representing a percentage that checked off a specific box.) Similar proportions rate their volunteers as highly or mostly effective, composing a combined 60 percent of their volunteers. Another 24 percent of volunteers are judged to be somewhat effective, and 15 percent are not at all effective.

Figure 18. Perceived Effectiveness of Volunteers



Source Association Staff Survey: What percentage of your volunteers would you estimate are the following? Please answer so that your total adds up to 100 percent.



Methods Used to Formally Assess Effectiveness

Evaluations are typically performed personally by staff or by the volunteer chair or supervisor. Obviously, some of these responses vary by who is being evaluated.

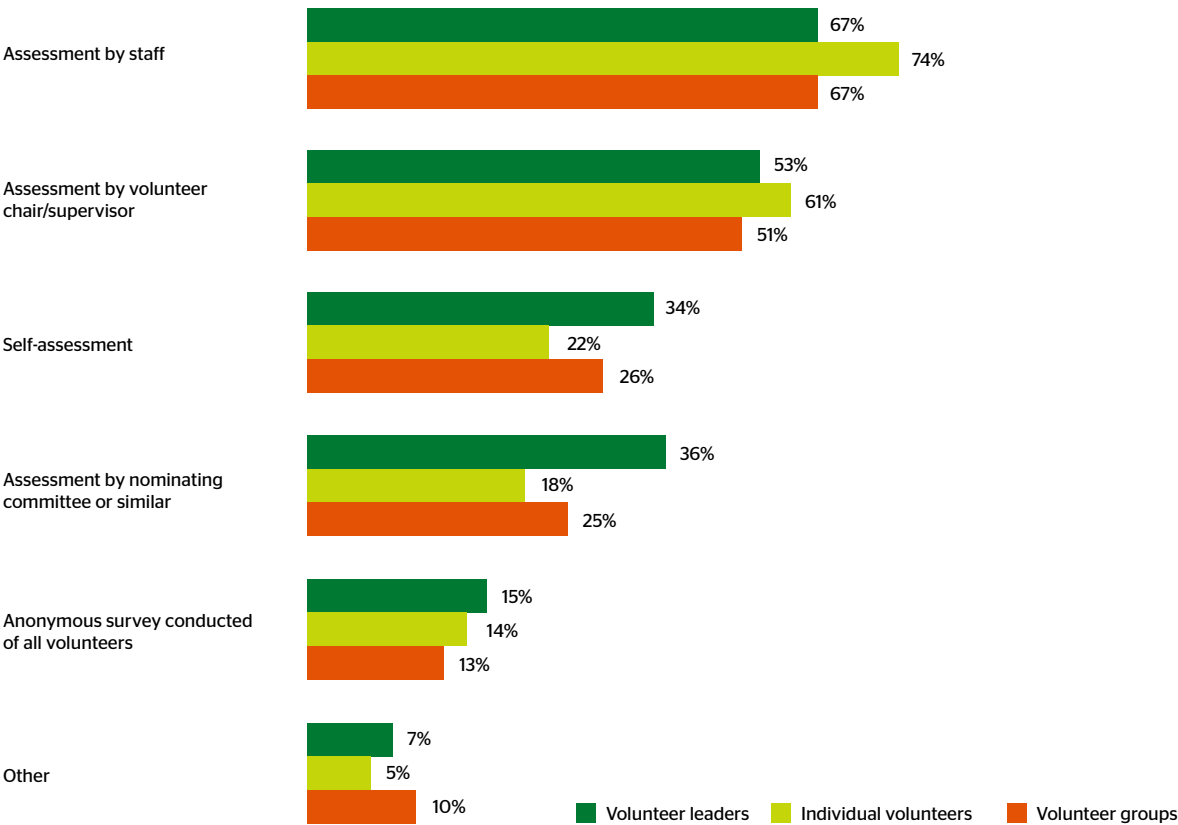
For example, individual volunteers are more likely to be assessed by staff, indicated by 74 percent of associations that evaluate their volunteer system at this level; 67 percent each have staff assess their volunteer leaders and groups.

Individual volunteers are also more likely to be assessed by their volunteer chair or supervisor (61 percent than are volunteer leaders (53 percent) or volunteer groups (51 percent).

Volunteer leaders are the aspect most likely to be assessed by a nominating committee or similar body, while 25 percent of volunteer groups and 18 percent of individual volunteers are assessed by them.

Both self-assessment and anonymous survey are used less often. Self-assessment is more common among volunteer leaders (34 percent) than among volunteer groups (26 percent) or individual volunteers (22 percent). A survey among all volunteers is used by only 13-15 percent of associations that use evaluations at each of the three levels of their volunteer system.

Figure 19. Methods Used to Formally Assess the Effectiveness of Volunteer Leaders, Individuals, and Groups

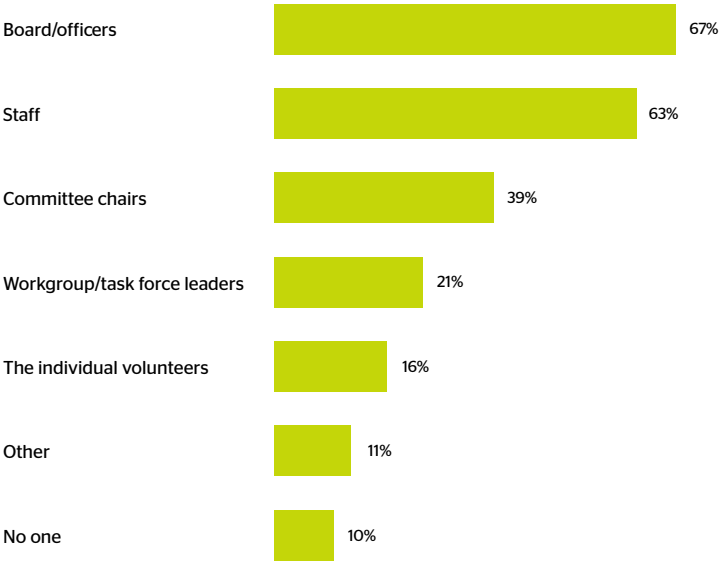


Source Association Staff Survey: What methods does your organization use to formally assess/evaluate the effectiveness of individual volunteers, volunteer leaders, and/or volunteer groups? Select all that apply.

Sharing Evaluations

In associations where they are conducted, evaluations are most commonly shared with the board or officers (67 percent) and staff (63 percent). Results are shared below this level less often, as just 39 percent share evaluations with committee chairs, 21 percent with workgroup/task force leaders, and 16 percent with individual volunteers. Another 10 percent conduct the evaluations but do not share them with anyone.

Figure 20. With Whom Formal Assessments are Shared



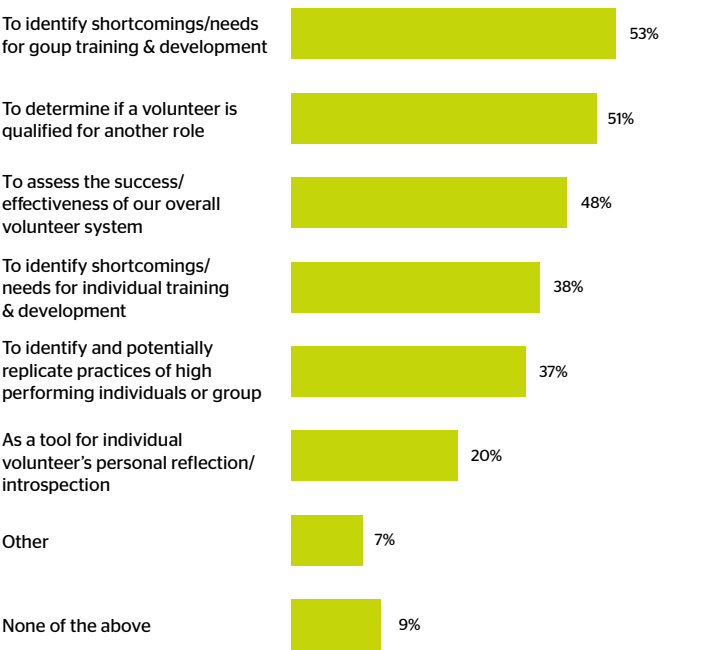
Source Association Staff Survey: With whom do you share these evaluations? Select all that apply.

Organizational Use of Evaluations

Associations report three primary uses of volunteer evaluations: to identify shortcomings or needs for group training and development (53 percent), determine whether volunteers are qualified for another role (51 percent), and assess the success or effectiveness of the overall volunteer system (48 percent).

Other common applications include identification of shortcomings/needs for individual training and development (38 percent) and identification and potential replication of the practices of high-performing individuals or groups (37 percent). Relatively few associations use it as a tool for the individual volunteer's personal reflection or introspection (20 percent) while 9 percent don't use the evaluations they conduct for any of these specific purposes.

Figure 21. Use of Assessments Within the Association



Source Association Staff Survey: How does your organization use these evaluations? Select all that apply.

Detailed Findings

Would Replace Some Current Volunteer Workforce\*

Many associations may think of volunteers as an additional unpaid workforce that functions as an extension of paid staff. When asked whether, if funding permitted it, they would replace some of the current volunteers, the largest proportion (44 percent) said yes, while 24 percent were unsure, and only 32 percent indicated no.

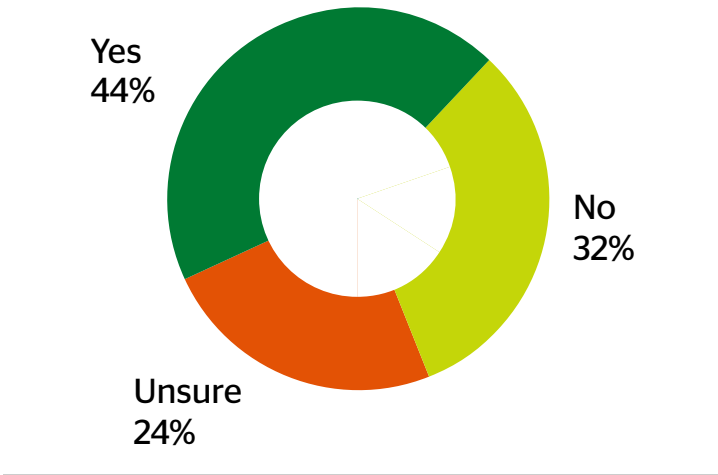
Rating Organizational Ability to Identify and Recruit Volunteers

Associations rarely rate themselves “excellent” for identification and recruitment of volunteers for a number of positive individual or collective traits. The common response is either “good” or “average,” with more rating themselves lower rather than higher on this scale.

The highest average ratings are for identifying and recruiting for a representative cross section, by geographic locations (3.56 on a 5-point scale, and types and sizes of organizations (3.52, while one of the lowest ratings is for a representative cross section of individual demographics (3.15 and an inclusive and diverse pool of volunteers overall (3.02

Associations also rate themselves low in an absolute sense but between these extremes for identification and recruitment of future leaders in their field (3.34 and the best-qualified potential volunteers (3.29.

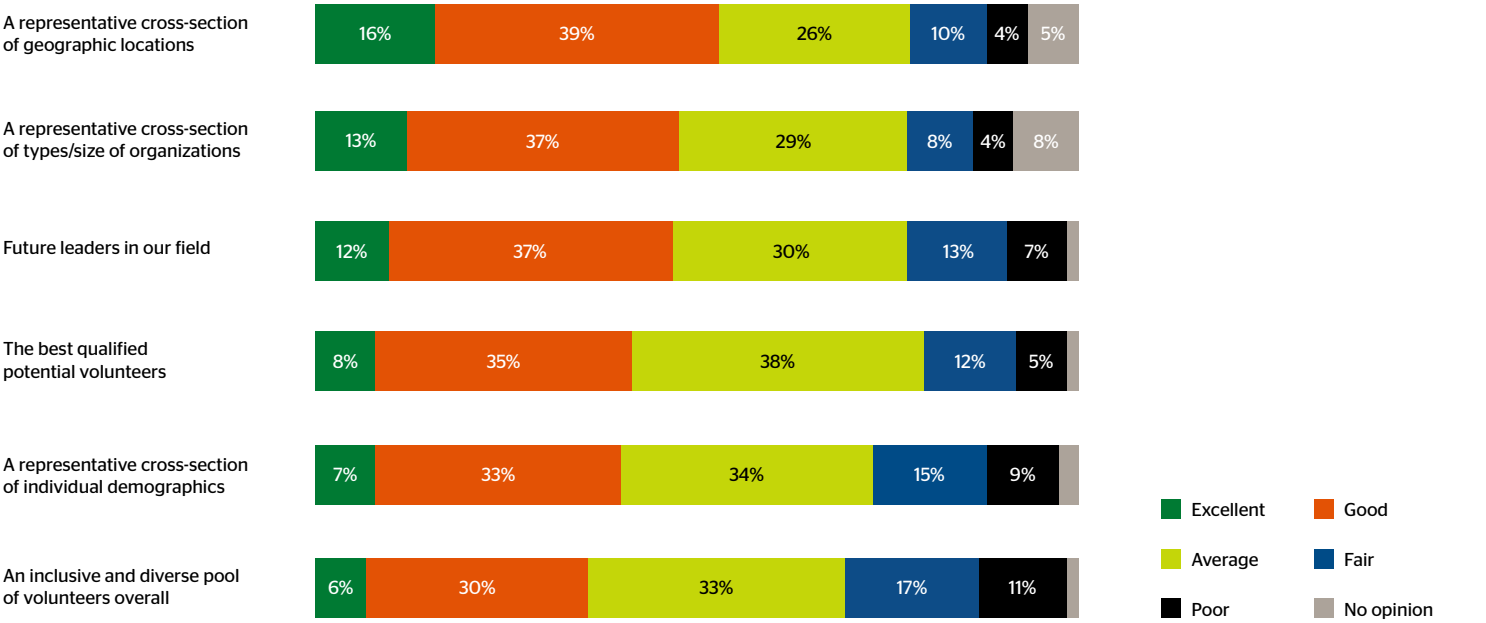
Figure 22. Percent of Association Staff who Would Replace Volunteers With Paid Staff Pending Funding



Source Association Staff Survey: Would you replace some of your current volunteer workforce with paid staff if funding permitted it?

\*Note: There is a discrepancy between these findings and that of the focus group findings where an overwhelming number of participants indicated they would not replace volunteers with paid staff. See page 29.

Figure 23. Organizational Ability to Identify and Recruit Volunteers Based on Specific Characteristics



Source Association Staff Survey: In your opinion, how would you rate the following? Please rate on a scale 1-Poor, 2-Fair, 3-Average, 4-Good, or 5-Excellent. If unsure, select No opinion.

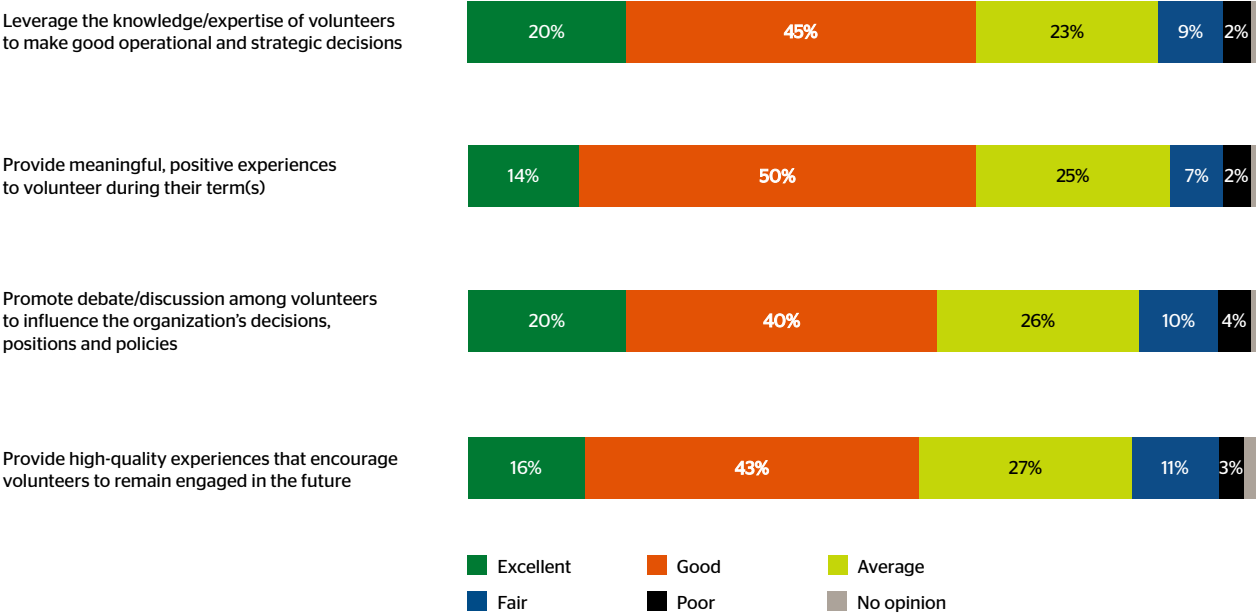
Rating Organizational Ability to Manage the Volunteer System

Compared to the previous qualities of identification and recruitment, there is a tighter cluster of association self-ratings for leveraging knowledge and expertise of volunteers to make good operational and strategic decisions (3.71; providing meaningful and positive experiences to volunteers during their term(s) (3.67; promoting debate and discussion among volunteers to influence the organization’s decisions, positions, and policies (3.63

and providing high-quality experiences that encourage volunteers to remain engaged in the future (3.58).

Compared to the previous qualities, more associations rate themselves “excellent” in these areas, and fewer rate themselves “poor,” with a little shrinkage in the proportion that rate themselves “average” or “poor.” The resulting average scores, however, suggest considerable room for improvement over time.

Figure 24. Organizational Ability to Manage Specific Aspects of Volunteerism



Source Association Staff Survey: In your opinion, how would you rate the following? Please rate on a scale 1-Poor, 2-Fair, 3-Average, 4-Good, or 5-Excellent. If unsure, select No opinion.

Detailed Findings

Rating Organizational Ability to Manage the Volunteer System

One shining feature of the volunteer system—allowing those not selected for volunteer service sufficient opportunities to participate or be engaged to some degree—is rated much higher than other qualities, with an average agreement of 4.52 on a 5-point scale.

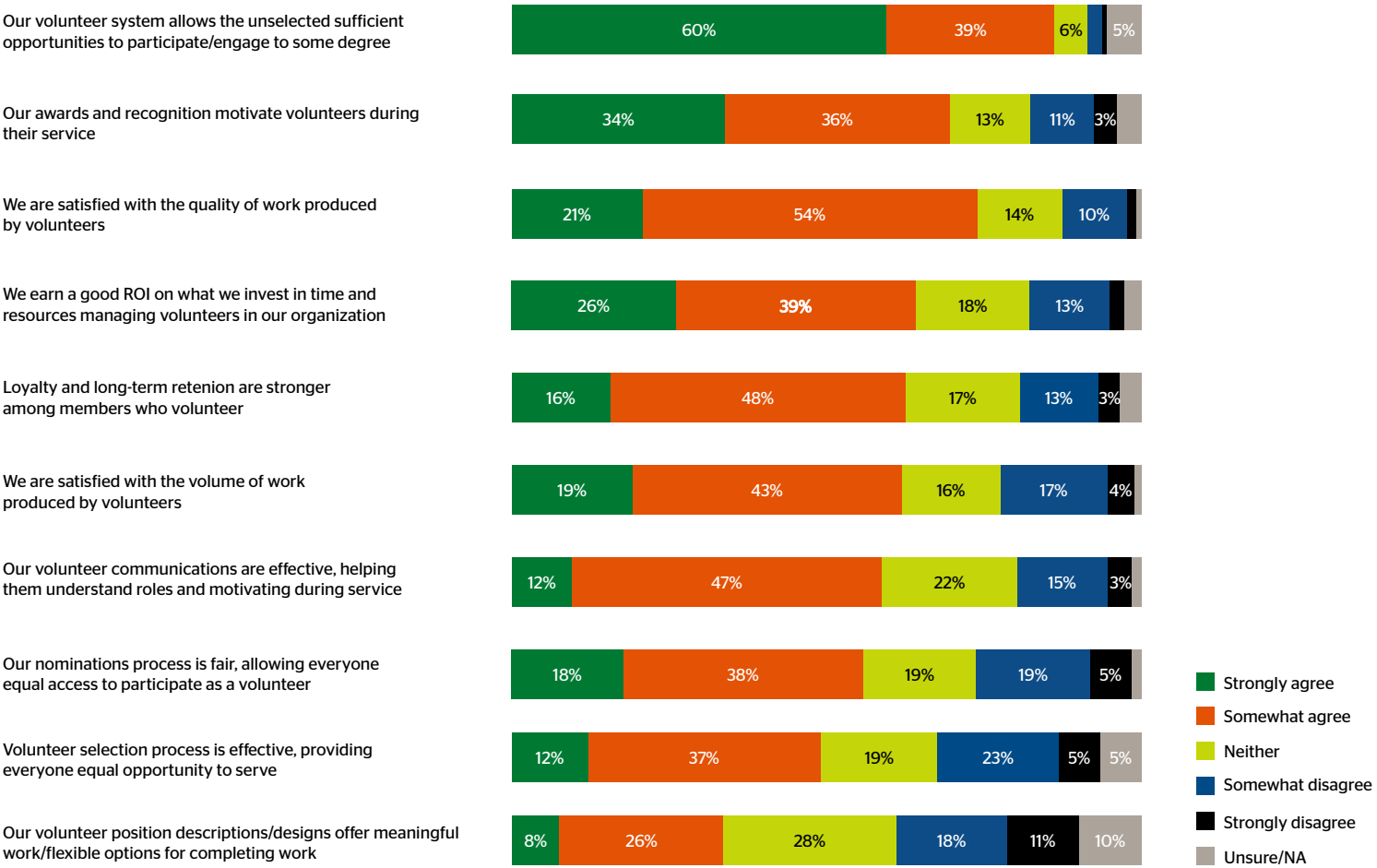
The next-highest-rated abilities include providing awards and recognition motivating volunteers during their service (3.89, being satisfied with the quality of work produced by volunteers (3.82 and earning a good return on investment on what they invest in time and resources managing volunteers in their organization (3.75.

Disappointing ratings include those for “loyalty and long-term retention are stronger among members who volunteer versus those who do not volunteer” (3.62, and “being satisfied with the volume of work produced by volunteers” (3.56.

For one, it is somewhat surprising that the traditional argument for engagement—that it (volunteering in this case) begets greater loyalty—is not being observed to a strong degree. Forty-eight percent somewhat agree, but roughly the same percentage of respondents strongly agree, neither agree nor disagree, or somewhat disagree, with this statement. For another, it is at least interesting to see a shift of 0.25 in average score from being satisfied with the quality versus the volume of volunteer’s work. This was driven by a shift of almost 10 percent more rating quality good compared to volume, and a corresponding shift of almost 10 percent more somewhat disagreeing or neither agreeing nor disagreeing that they are satisfied with the volume.

Some qualities rated slightly lower include a fair nominations process (3.46), effective volunteer communications (3.50), and effective selection process (3.31). In particular, volunteer position descriptions or designs rated 3.01 for offering meaningful work and flexible options for completing that work.

Figure 25. Organizational Ability to Manage Specific Features of Volunteerism



Source Association Staff Survey: In your opinion, to what extent do you agree with the following statements? Please rate on a scale 1-Strongly disagree, 2-Somewhat disagree, 3-Neither agree nor disagree, 4-Somewhat Agree, or 5-Strongly agree. If unsure, select Unsure/NA.

Statements True About Associationn

“No volunteer system is perfect” might be a good mantra for the way association staff evaluate their systems. Perhaps one exception is the 11 percent who indicate none of the specific possible weaknesses we asked them to identify.

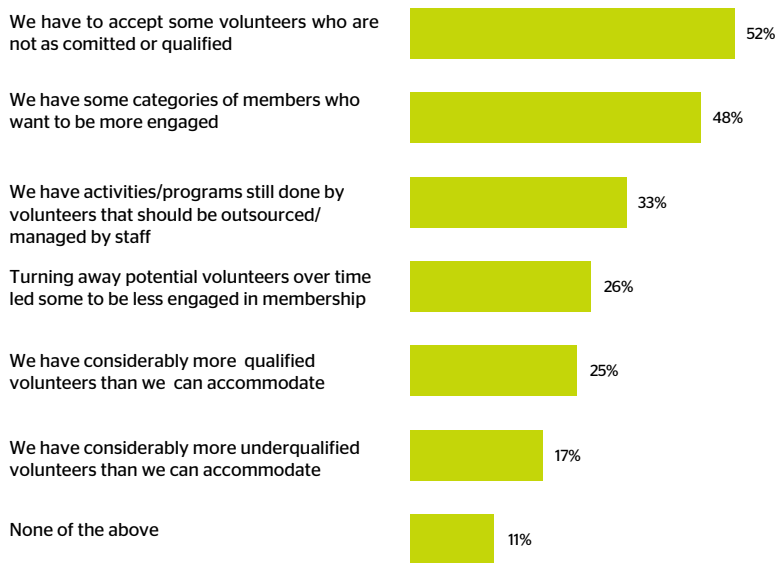
The most common specific weaknesses identified are having to accept some volunteers who are not as committed or qualified for any reason (52 percent and having some categories of members who want to be more engaged such as suppliers or other non-core members (48 percent [Note: some labels on graphics are truncated to allow reasonably attractive displays.]

Having activities or programs still done by volunteers that should be outsourced or managed by staff (33 percent is less common, while about one fourth report that turning away potential volunteers over time has led some members to be less engaged in their membership (26 percent

Having considerably more qualified volunteers than they can accommodate is reported by a quarter. Having considerably more underqualified volunteers than they can accommodate is a similar problem, reported by only 17 percent.

Several of these states reflect an imbalance between the supply and demand of volunteers, which always creates pressure for an association to optimally balance the pool of potential volunteers and their mix of qualifications with the actual needs of the association. An imbalance may reduce the overall benefit of greater loyalty that we would expect from engaging our members due to not being able to accommodate all of them, as turning away many is an issue for some associations. Conversely, it's more common for associations to have to accept some less-qualified or less-committed volunteers and to have them do some activities that should ideally be handled in-house or through outsourcing to paid services.

Figure 26. Perceived True Statements About Volunteers, Members, and Activities That May Negatively Impact Association Volunteer Management



Source Association Staff Survey: In your opinion, which of the following statements are true about your association? (Select all that apply).

## Detailed Findings

### Strengths or Weaknesses of Volunteer System

A direct assessment of aspects of the volunteer system shows that “a reasonable schedule and time requirements” is most likely to be a net asset, with 73 percent regarding it as a strength, and 13 percent as a weakness.

This +60 percent net strength less weakness is followed by two other features with a net of about half who regard them as strengths rather than weaknesses—the high strategic importance of volunteer work that makes service more appealing (+52 percent, and committee or leadership roles rotating voluntarily or through bylaws (+49 percent.

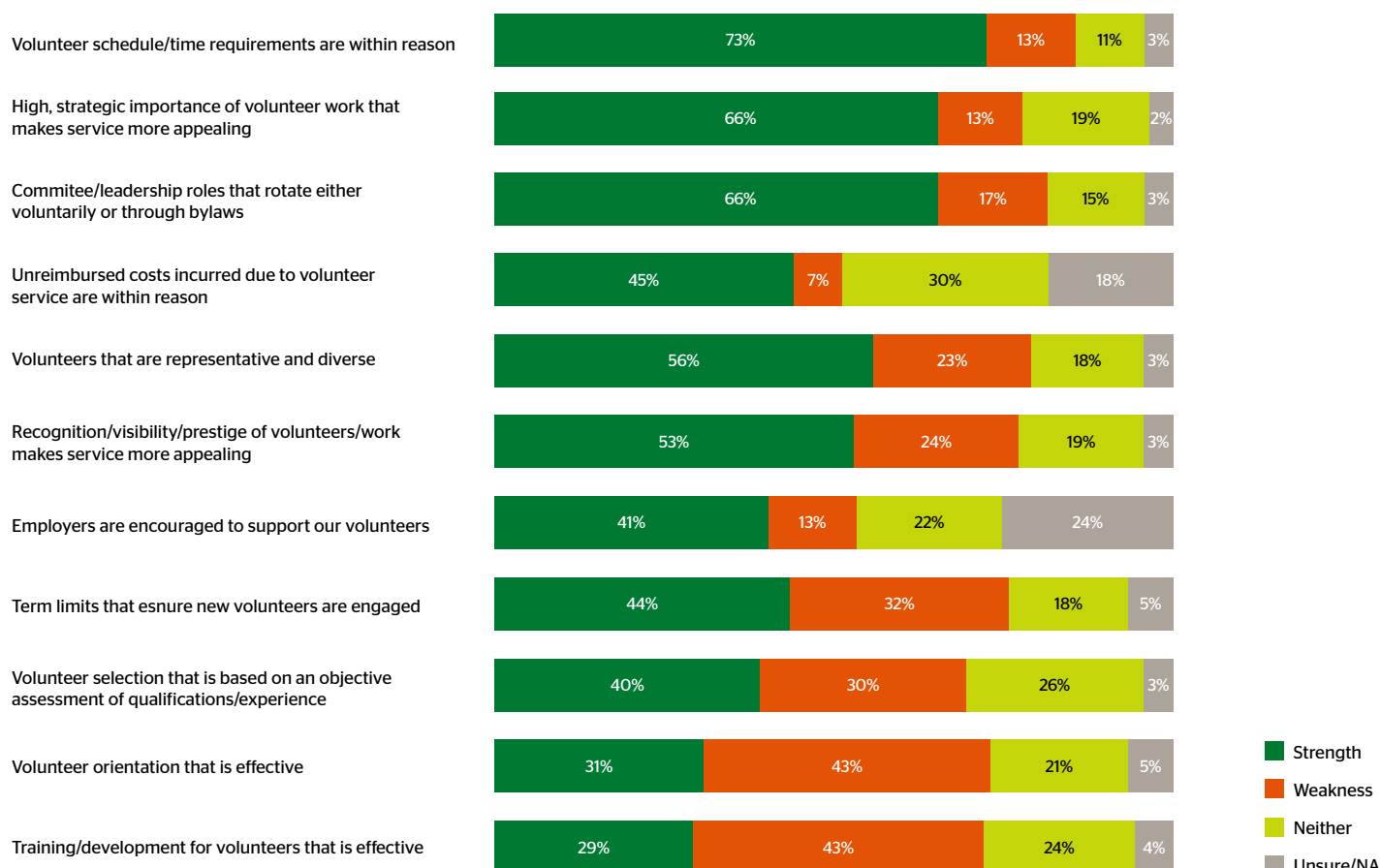
Other net strengths include reasonable unreimbursed costs incurred by volunteer service (+37 percent) representative and diverse volunteers in terms of geographic location, demographics,

or business/professional characteristics (+33 percent); appeal of the recognition, visibility, or prestige of volunteers and volunteer work (+29 percent); and employers being encouraged to support volunteers with reimbursement and paid time off (+28 percent).

Several factors that are near-neutral in their impact include term limits that ensure new volunteers are engaged (+12 percent) and volunteer selection based on an objective assessment of qualifications and experience (+9 percent). The latter was rated somewhat lower than other features of the volunteer management system, of course.

The two qualities that have more who regard it as a weakness than a strength are an effective volunteer orientation (-12 percent) and effective training/development for volunteers (-14 percent).

**Figure 27. Strengths and Weaknesses of an Association Volunteer System**



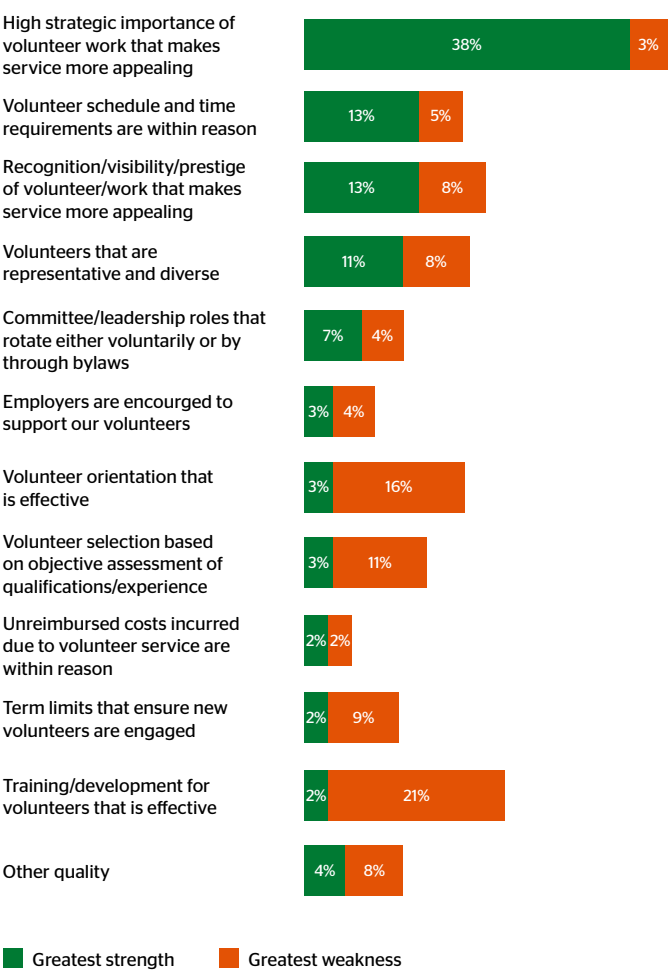
Source: Association Staff Survey: In your opinion, which of the following do you regard as strengths or weaknesses of your volunteer system? Please answer based on your perceptions if you lack any data or systematic evaluation. Select all that apply.

Greatest Strengths and Weaknesses

There is a clearer consensus regarding the greatest strength, as 38 percent of participating associations report that the high strategic importance of volunteer work is greatest, and 11-13 percent each cite reasonable schedule/time requirements, recognition/visibility/prestige, and representative/diverse volunteers. Only 25 percent indicate another greatest strength, with 7 percent noting rotating roles and only 2-4 percent indicating each other quality.

The most common greatest weakness is either training and development (21 percent) or volunteer orientation (16 percent), which we could infer from the previous question. Weaknesses also included a wide array of other qualities including volunteer selection (11 percent), term limits (9 percent), and recognition/visibility/prestige and representative/diverse volunteers (8 percent each). Reasonable volunteer schedules and time requirements, rotating committee and leadership roles, and encouraging employer support (4-5 percent) are also present as the primary weakness in some associations.

Figure 28. Greatest Strengths and Weaknesses of an Association Volunteer System



Source: Association Staff Survey: Based on your answers to the previous question, what do you regard as the single greatest strength/weakness of your volunteer system?



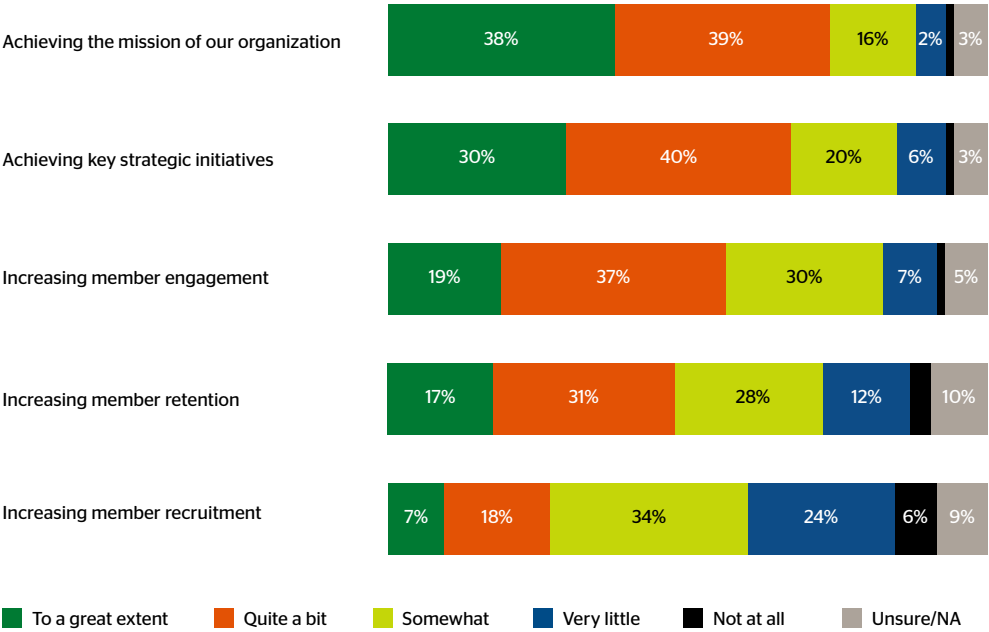
Extent that Volunteer Management System Has a Positive Influence

The volunteer system is seen as having the greatest positive influence on achieving the mission of the organization (4.14 on a 5-point scale) and some positive influence on achieving key strategic initiatives (3.92). Representatives of participating associations are almost split between feeling that their volunteer system positively influences achievement of mission to a great extent or quite a bit, with only 23 percent reporting that it does so somewhat or less.

In contrast, the impact on membership is much lower. Average scores for increasing member engagement (3.69), retention (3.53), and particularly recruitment (2.96) are much lower. The proportion of participants who indicate quite a bit of positive impact is greater than the number who report a somewhat positive impact for engagement and retention, but fewer than 20 percent feel there is a great extent of positive impact.

For retention, 15 percent feel that there is very little or no impact on retention, while 10 percent are unsure. For recruitment, 30 percent feel there is little or no impact, and only 25 percent feel the impact is to a great extent or quite a bit.

Figure 29. Extent to Which an Association Volunteer Management System Positively Influences Specific Goals



Source: Association Staff Survey: To what extent does your volunteer management system positively influence the following? Please rate on a scale 1-Not at all, 2-Very little, 3-Somewhat, 4-Quite a bit, or 5-To a great extent. If unsure, select Unsure/NA.

# Detailed Findings

## Belief That COVID-19 Pandemic Changed Volunteer Participation

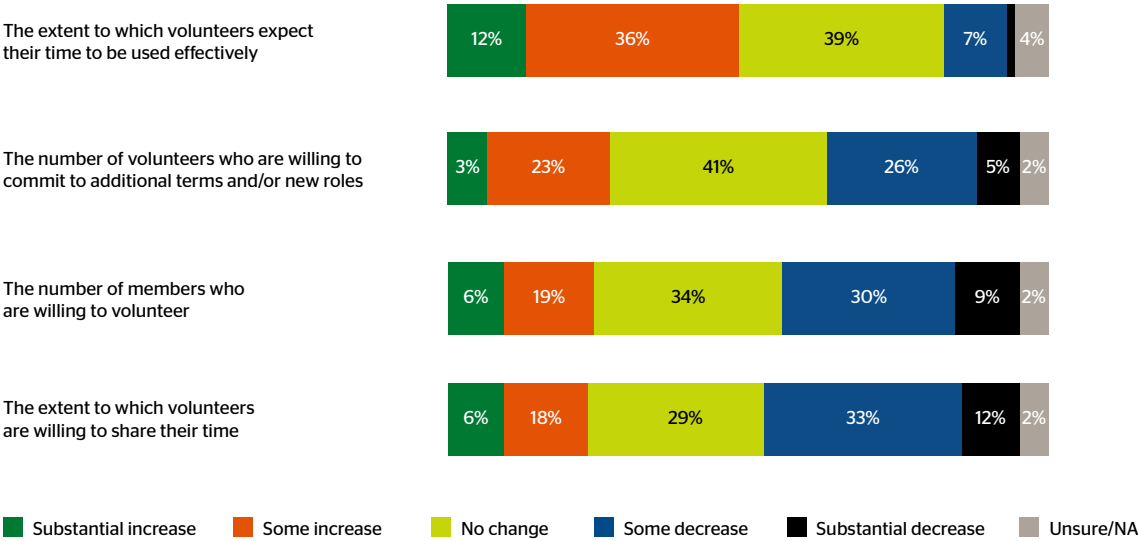
Of course, conducting a survey at what we hope is near the end of a pandemic requires some reality check to determine how much our findings reflect our unique times.

Associations are most likely to indicate a net decrease in the extent to which volunteers are willing to share time, with 45 percent reporting a decrease, 24 percent reporting an increase, and a net -21 percent decrease. Almost as many (-14 percent report a net decrease in the number of members willing to volunteer, with 24 percent

increasing and 39 percent decreasing. The number of volunteers willing to commit to additional terms and/or new roles (-5 percent net decrease) shows a closer balance between the number who saw an increase (26 percent) or a decrease (31 percent).

The one area showing a sharp increase is the extent to which volunteers expect their time to be used effectively (+39 percent), with 48 percent increasing and 9 percent decreasing due to the pandemic.

Figure 30. Changes to Volunteer Participation Due to COVID-19



Source Association Staff Survey: To what extent do you believe the COVID-19 pandemic changed volunteer participation in your organization? Please rate on a scale 1-Substantial decrease, 2-Some decrease, 3-No change, 4-Some increase, or 5-Substantial increase. If unsure, select Unsure/NA.

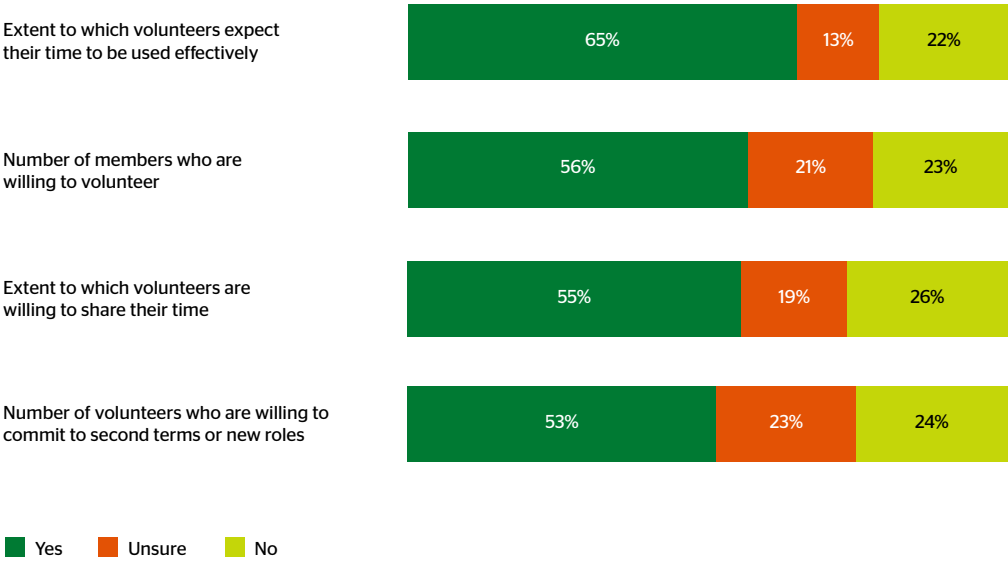
Feeling That Changes Will Continue After Pandemic Is Resolved

Of course, the permanence of the recent changes caused by COVID-19 is also an open question.

Generally, associations expect continuity, with 65 percent expecting the extent to which volunteers expect their time to be used effectively will continue while 22 percent believe it will not continue.

The other three short-term trends show very similar patterns. Slightly more than half expect the trend in the number of willing volunteers, those willing to commit to second terms or new roles, or being willing to share their time to remain, while about one fourth each believe these trends will not continue.

Figure 31. Lasting Effect of Changes to Volunteer Participation Due to COVID-19



Source Association Staff Survey: Do you feel the changes above will continue after the pandemic has resolved?

Volunteer Experience Survey

The volunteer experience survey was the second of two key quantitative data collections in the overall research project. This survey was used to measure the structure and performance of volunteer systems as perceived by the volunteers themselves. Findings helped to inform overall study findings and recommendations.

Methodology

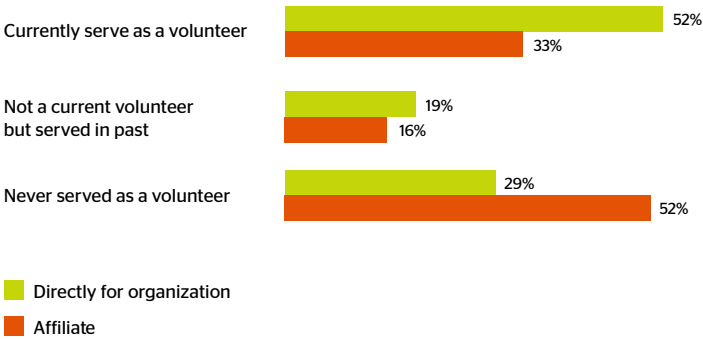
A survey was administered by Whorton Research & Marketing on behalf of the research team to volunteers and members of participating associations. Several messages were sent to encourage them to respond. A total of 6,260 surveys were submitted with useable data from 49 different associations.

Findings

Formal or Informal Engagement as a Volunteer

To distinguish between activity with the headquarters organization and any affiliates that existed within each participating association's structure, the survey began by asking respondents to describe their history of participation at both levels. (If a participating association indicated not having affiliates, that question was hidden. Generally, surveys referred to "geographic affiliates," but this language was altered to include other subsidiaries, such as a foundations, if those were the closest approximation to an affiliate

Figure 32. Formal or Informal Volunteer Engagement Directly for an Association or Affiliate



Source Volunteer Experience Survey: How have you been formally or informally engaged as a volunteer directly for the organization or with a geographic affiliate?

For the primary organization (the global, national, state, or local participating association), 52 percent of respondents are current and 19 percent are former volunteers, while 29 percent never served. For their affiliates, 33 percent are current and 16 percent are former volunteers, while 51 percent have never volunteered.

Primary Volunteer Role

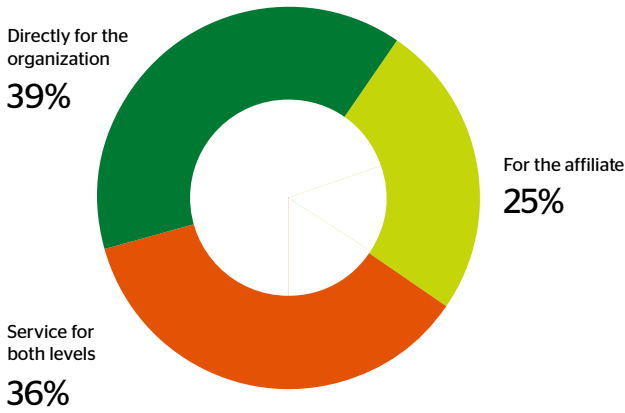
To ensure clarity of findings and avoid overloading respondents who participate at both levels, the survey asked respondents who participate at both levels which level they regard as primary.

This information was then used to control the display of questions so that those who indicated direct or both levels as primary would see questions regarding direct service, and those who regarded their volunteer work at the affiliate level would see only questions regarding their affiliate service.

Respondents tended to prioritize direct service to the organization somewhat higher, as 39 percent regarded it as primary while 25 percent regarded the affiliate as primary and 36 percent could not draw a distinction, regarding their volunteer service at both levels as equally important.

Combining responses to both questions resulted in a base of respondents who consisted primarily of direct-to-the-organization volunteers (62 percent) and far fewer affiliate volunteers (18 percent) while another 20 percent were non-volunteers, indicating that they had never served as a volunteer at either level. The latter segment inordinately reflects the responses of some participating associations that could not distinguish between volunteers and less engaged, "rank and file" members.

Figure 33. Primary Volunteer Engagement



Source Volunteer Experience Survey: Which do you regard as your primary volunteer role if you are or have volunteered for the organization and an affiliate? Select one.

History of Volunteer Experiences

The average volunteer’s member life cycle consisted of joining the organization a mean of 16.8 years ago, with a mean of 6.1 years in the industry before joining. The average first year of volunteering at the direct organizational level occurred a mean of 11.5 years ago and at the affiliate level a mean of 13.8 years ago. Combining the two volunteer responses shows that the first volunteer experience occurred a mean of 12.8 years ago.

Looking at this another way in aggregate, the typical lag time before becoming a volunteer is a mean of 5.3 years at the direct organizational level, but only 3.0 years at the affiliate level (calculated by subtracting 11.5 and 13.8 years from the 16.8 years since first joining. This reinforces the old adage that a component is often a “farm team” for headquarters volunteers, so when affiliates exist, volunteers tend to engage a little earlier in their career.

Those who are former volunteers are relating somewhat recent experiences—they report last volunteering directly a mean of 4.6 years ago and at the affiliate level a mean of 6.1 years ago. It should be noted in general that the median, or midpoint, is almost always substantially smaller, meaning that the mean, or arithmetic average, reflects the influence of some outliers who took all of these actions longer ago than the typical respondent.

Figure 34. Average and Median Number of Years’ Experience With Profession and Volunteering for the Association or Affiliate

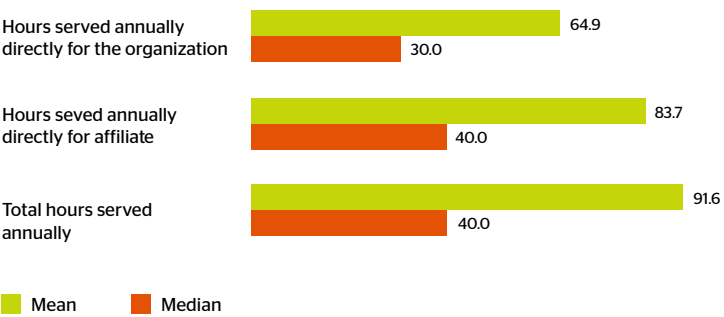


Source Volunteer Experience Survey: Please tell us about your experiences with the profession and volunteering with the organization and/or affiliate.

Total Annual Hours Volunteering in Current or Most Recent Position(s)

The median total annual workload for a volunteer is 30 hours directly for the organization and 40 hours for an affiliate, while the median total hours between the two levels is 40 hours. The means are considerably larger, with those who served the organization directly reporting 64.9 hours, those who served the affiliate reporting 83.7 hours, and the combination of everyone who currently volunteers at one or both levels reporting 91.6 hours.

Figure 35. Average and Median Hours Spent Volunteering Annually for the Association or Affiliate



Source Volunteer Experience Survey: How many hours have you spent volunteering in your current position(s)?

Current or Former Volunteer Role(s) Held

The most common direct volunteer roles for the organization are serving as a member of a standing committee (60 percent or informal committee or workgroups (36 percent and serving as a committee or task force chair (36 percent

Naturally, considerably fewer served as an officer such as president (or chair, vice president (or vice chair, or treasurer (19 percent, or as an executive committee member (12 percent, while 27 percent have served a board member (27 percent

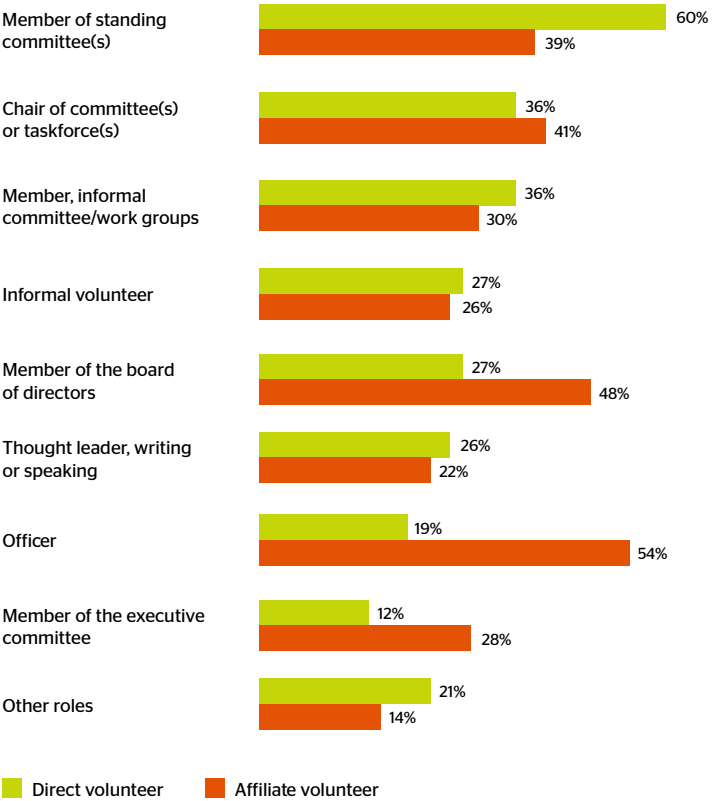
Relatively few served as an informal volunteer in roles such as supporting advocacy, monitoring conference rooms, or recruiting members (27 percent, or as a thought leader writing or speaking for publications or events (26 percent

We realize in our discussions with some of the representatives of participating associations that many of their members might not think of themselves as volunteers because the culture tends to equate “volunteering” with formal roles, and our ability to convert questions once the project was launched was very limited. However, judging from the 21 percent who indicate other roles, many of these are similar in nature to writing, speaking, or serving in ad hoc roles, so these two categories underrepresent the number of volunteers actually serving in them.

Among those who have served as volunteers with the affiliate, a higher proportion of them report senior roles. The most common are officer (54 percent, board member (48 percent, and chair of committees or task forces (41 percent, while many have also served as executive committee members (28 percent

Other roles reported less frequently include serving as a member of informal committees or workgroups (30 percent, an informal volunteer (26 percent, or a thought leader (22 percent

Figure 36. Currently or Previously Held Volunteer Role(s)



Source Volunteer Experience Survey: What volunteer role(s) do you currently and/or have held directly for the organization and/or affiliate? Select all that apply.

Most Important Reasons for Involvement as a Volunteer

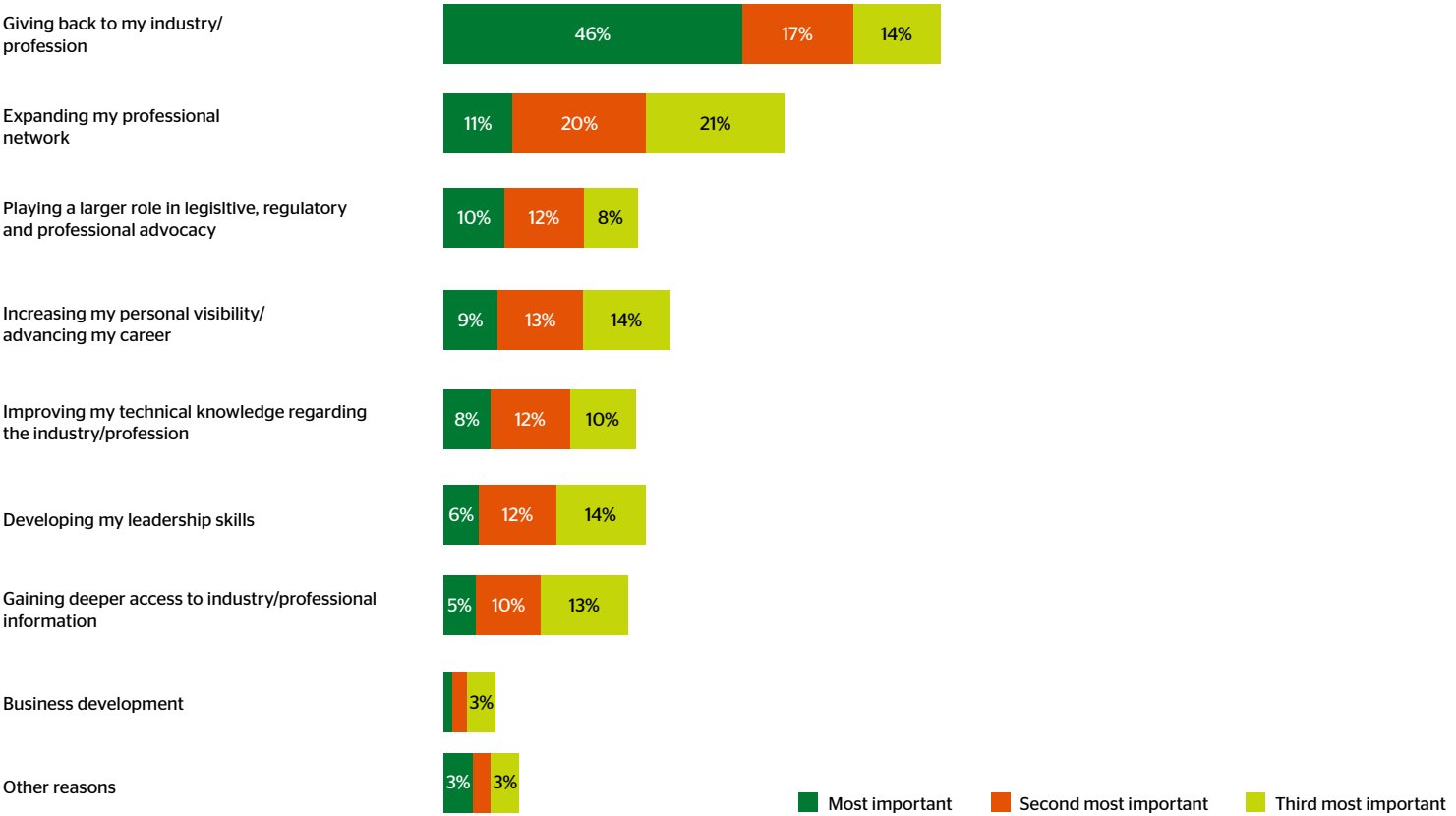
Almost half of volunteers regard giving back to their industry or profession as the most important reason, and more than three fourths regard it among the three most important reasons why they are or were involved.

Expanding their professional network is among the second- or third-most-important reasons, and with 11 percent rating it most important, is among five other reasons cited as most important by 5-10 percent of volunteers. These include playing a larger role in legislative,

regulatory, and professional advocacy; personal visibility or advancing their career; improving their technical knowledge regarding the industry or profession; developing leadership skills; and gaining deeper access to industry and professional information.

The key concept that strikes us is balance—beyond an altruistic motive of supporting the field and to network, volunteers have a variety of motives that are among the top motivating forces for 30-35 percent each.

Figure 37. Top Reasons (in Order of Importance) for Volunteering



Source Volunteer Experience Survey: What are the three most important reasons you are or were involved as a volunteer?

Satisfaction With One’s Volunteer “Career”

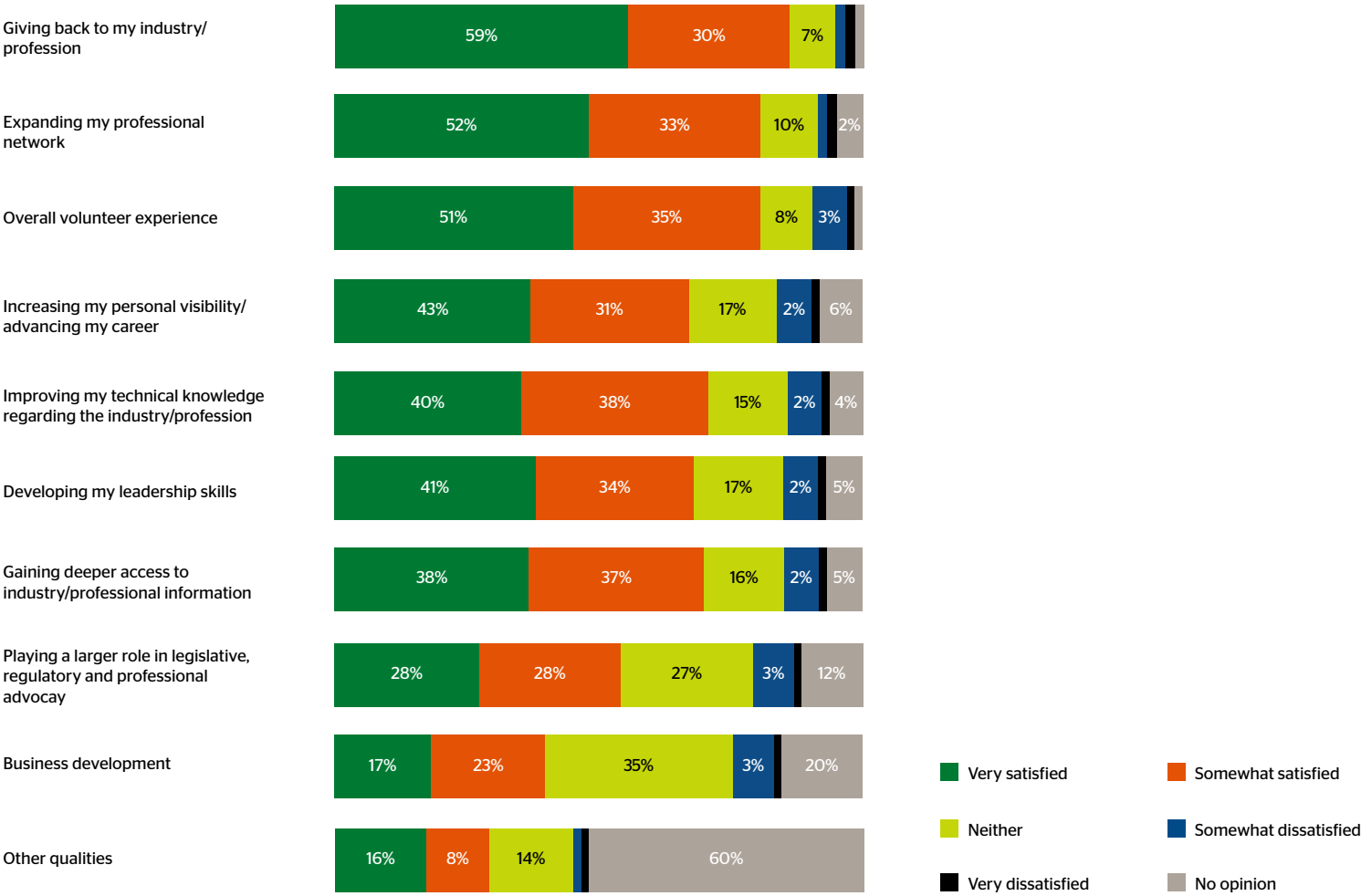
The most prominent reasons for becoming a volunteer are also the aspects for which volunteers report the highest satisfaction. Giving back (4.48 and expanding their professional network (4.38 are rated highest, along with the catch-all for overall volunteer experience (4.32 on a 5-point scale.

In a second, very tight cluster of scores are increasing personal visibility or advancing their career and improving technical

knowledge regarding the industry or profession (4.20 each), developing leadership skills (4.19), and gaining deeper access to industry or professional information (4.16).

The least-satisfying aspects are still rated reasonably well, with playing a larger role in legislative, regulatory, and professional advocacy (3.90) and business development (3.65) having at least half of those expressing an opinion indicating that they are very or somewhat satisfied.

Figure 38. Satisfaction with Reasons for Volunteering



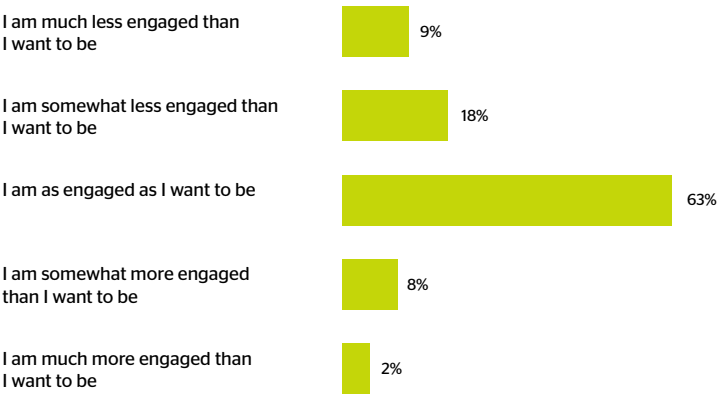
Source Volunteer Experience Survey: How satisfied are you with your overall volunteer “career”? Please rate on a scale 1-Very dissatisfied, 2-Somewhat dissatisfied, 3-Neither satisfied nor dissatisfied, 4-Somewhat satisfied, or 5-Very Satisfied. If unsure, select No opinion.



Current Level of Volunteer Engagement Compared to Desired

Volunteers have generally achieved a balance between their desired and actual levels of engagement. With the majority (63 percent) indicating they are as engaged as they want to be, 18 percent and 9 percent, respectively, indicate that they are somewhat or much less engaged than they want, while 8 percent and 2 percent, respectively, are somewhat or much more engaged than they want to be.

Figure 39. Desired Level of Volunteer Engagement



Source Volunteer Experience Survey: How does your current level of volunteer engagement compare to your desired level?

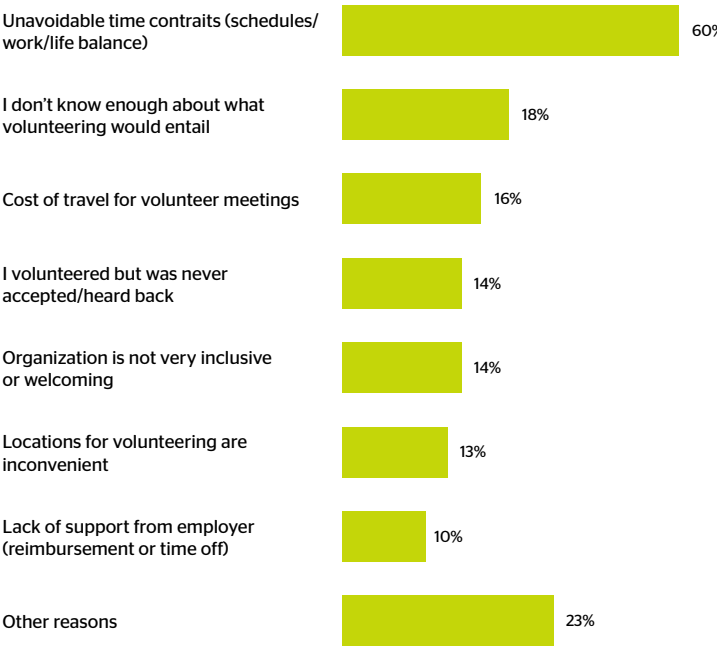
Factors That Limit Ability to be More Engaged as a Volunteer

Among those who are less involved than they want to be, time constraints such as work schedules and work-life balance are by far the most common, cited by 60 percent.

Other impediments chip away at their actual engagement, with 18 percent saying their awareness of what other volunteering would entail and between 13 percent and 16 percent citing cost of travel, volunteering without feedback or acceptance, an unwelcoming or not-inclusive organization, and inconvenient locations for volunteering.

The least common reason was lack of support from their employer (10 percent) in terms of time off or reimbursement.

Figure 40. Factors Limiting the Ability to Be More Engaged



Source Volunteer Experience Survey: What factors tend to limit your ability to be more engaged as a volunteer? Select all that apply.

Likelihood of Future Volunteer Engagement

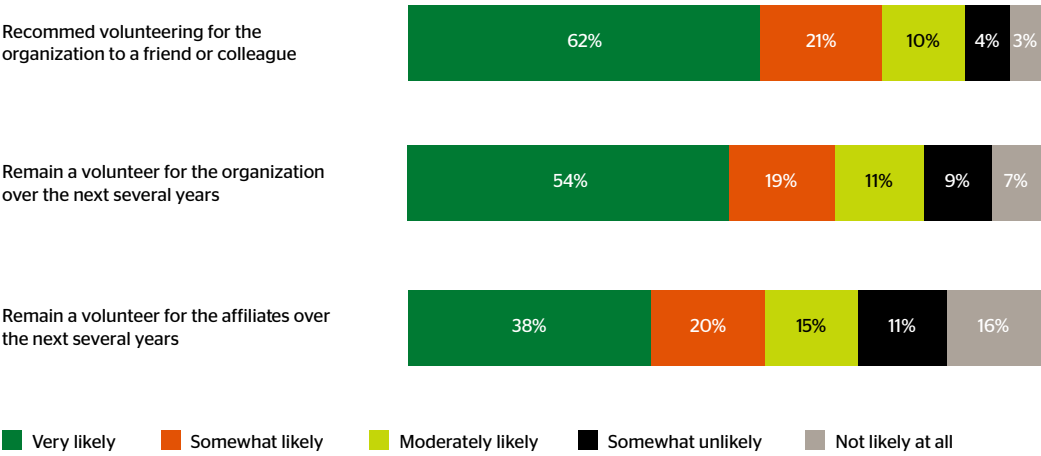
The likelihood of recommending volunteering to friends or colleagues is relatively high: an average score of 4.36 on a 5-point scale. This is higher than what is also a reasonably high anticipated retention of volunteers over the next several years (4.06 and much higher than the anticipated retention of affiliate-level volunteers (3.54.

A large majority (83 percent say that they are very or somewhat likely to recommend volunteering in the organization.

However, current direct-organization volunteers report more of a split—between 54 percent who are very likely and 30 percent who are somewhat or moderately likely to remain a volunteer over the next several years. (Of course, the nature of serving in defined terms and the ability to switch between committees or roles after terms have ended mean that this status reflects a mix of decisions on the part of the volunteer and the organization.)

At the affiliate level, current volunteers are much less likely to remain a volunteer over the next several years, with 38 percent very likely, 35 percent either somewhat or moderately likely, and 27 percent somewhat unlikely or not likely at all.

Figure 41. Likelihood of Recommendation and Remaining a Volunteer



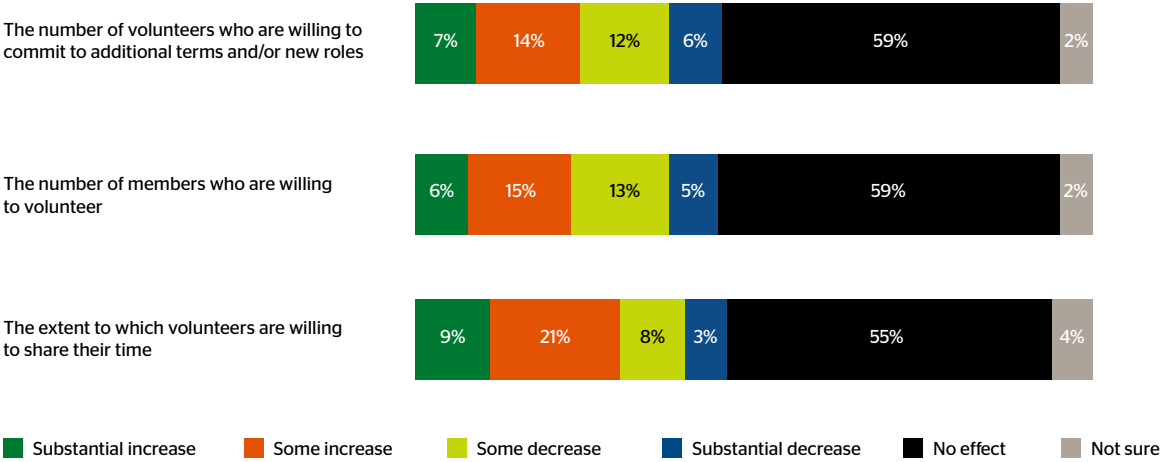
Source Volunteer Experience Survey: How likely is it that you will remain a volunteer for the organization and/or affiliate over the next several years and recommend volunteering for the organization to a friend or colleague? Please rate on a scale 1-Not at all likely, 2-Somewhat unlikely, 3-Moderately likely, 4-Somewhat likely, or 5-Very likely.

Extent that Pandemic Changed Volunteer Participation

A majority of current and former volunteers report that the COVID-19 pandemic had no effect on key aspects of their volunteer participation.

For two of them, a roughly equal proportion believe that the pandemic led their extent of willingness to volunteer and the amount of time they are willing to share has roughly equal proportions increasing or decreasing. Consistent with the expectations of association staff, 19 percent more report that the extent to which they expect their time to be used effectively increased rather than decreased.

Figure 42. Change in Volunteer Habits Due to COVID-19



Source Volunteer Experience Survey: To what extent do you believe the pandemic has changed your volunteer participation? Please rate on a scale 1-Substantial decrease, 2-Some decrease, 3-No effect, 4-Some Increase, or 5-Substantial increase. If unsure, select Not Sure.

## Detailed Findings

### Agreement with Statements Regarding Volunteer System

All average satisfaction scores fall between 3.1 and 4.1 on a 5-point scale.

The highest-rated attribute is having an open volunteer nomination process in which anyone can be considered (4.06, with about a 5 percent drop to offering well-designed volunteer roles providing opportunities to make a meaningful contribution to the industry or profession (3.87).

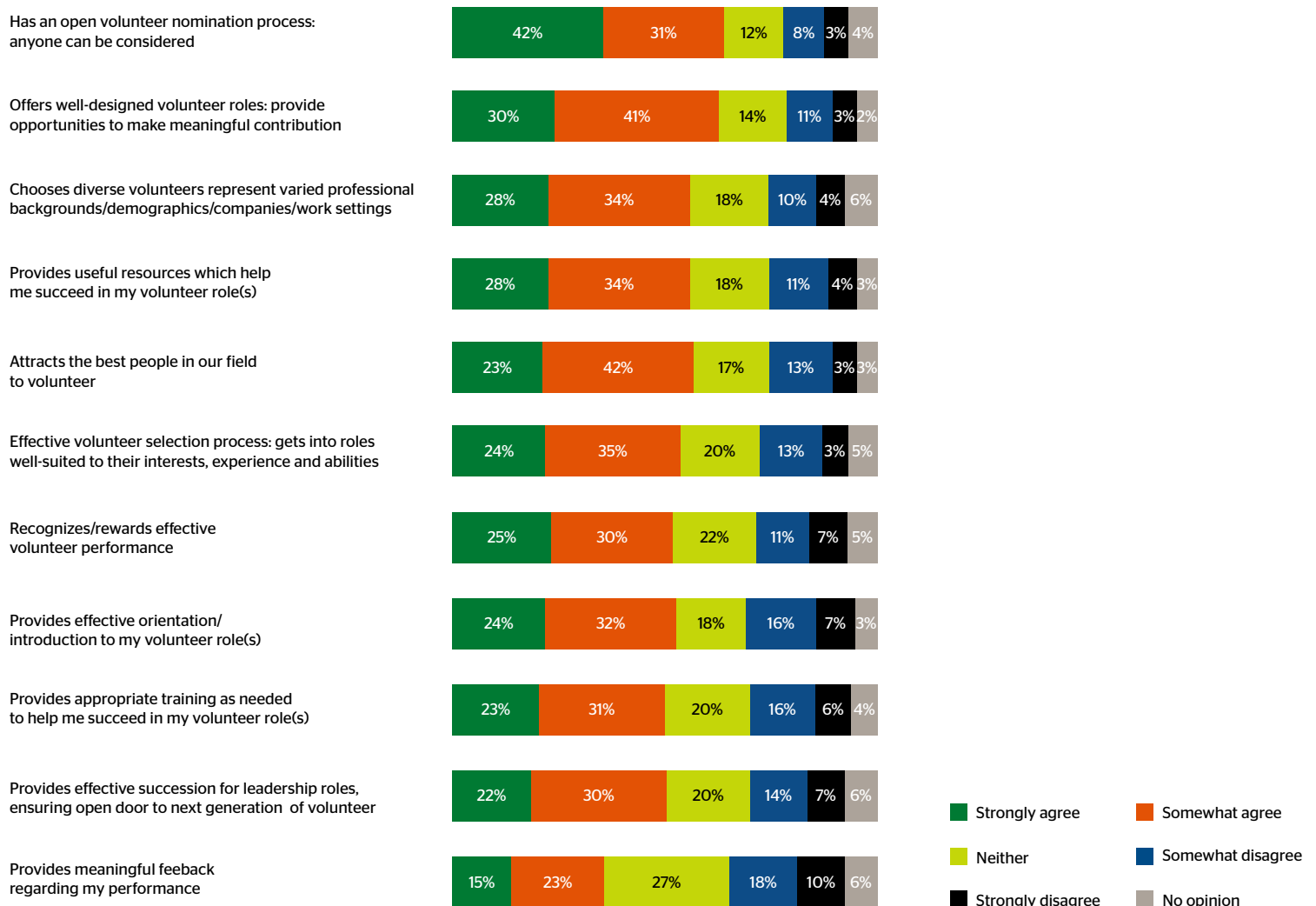
These four aspects cluster closely together: chooses diverse volunteers who represent varied professional backgrounds, demographics, and types of companies or work settings (3.77; provides useful resources which help me succeed in my volunteer

roles (3.73); attracts the best people in our field to volunteer (3.70); and has an effective volunteer selection process that gets volunteers into roles well-suited to their interests, experience, and abilities (3.67).

Another three aspects clustering together with satisfaction about 5 percent lower than the previous tier are recognizing and rewarding effective volunteer performance (3.58); providing effective orientation or introduction to their volunteer roles (3.52); providing appropriate training as needed to help them succeed; and providing effective succession for leadership roles ensuring an open door to the next generation (3.49 each).

Consistent with other findings, it seems logical that providing meaningful feedback regarding my performance (3.17) is by far the lowest-rated quality.

### Figure 43. Assessment of Activities Employed by Associations to Manage Volunteers



Source: Volunteer Experience Survey: How well does the organization or affiliate's volunteer system perform, based on your observations and experiences? Please rate on a scale 1-5: 1-Strongly disagree, 2-Somewhat disagree, 3-Neither agree nor disagree, 4-Somewhat agree, or 5-Strongly agree. If unsure, select No opinion.

Most Important Elements of an Association’s System

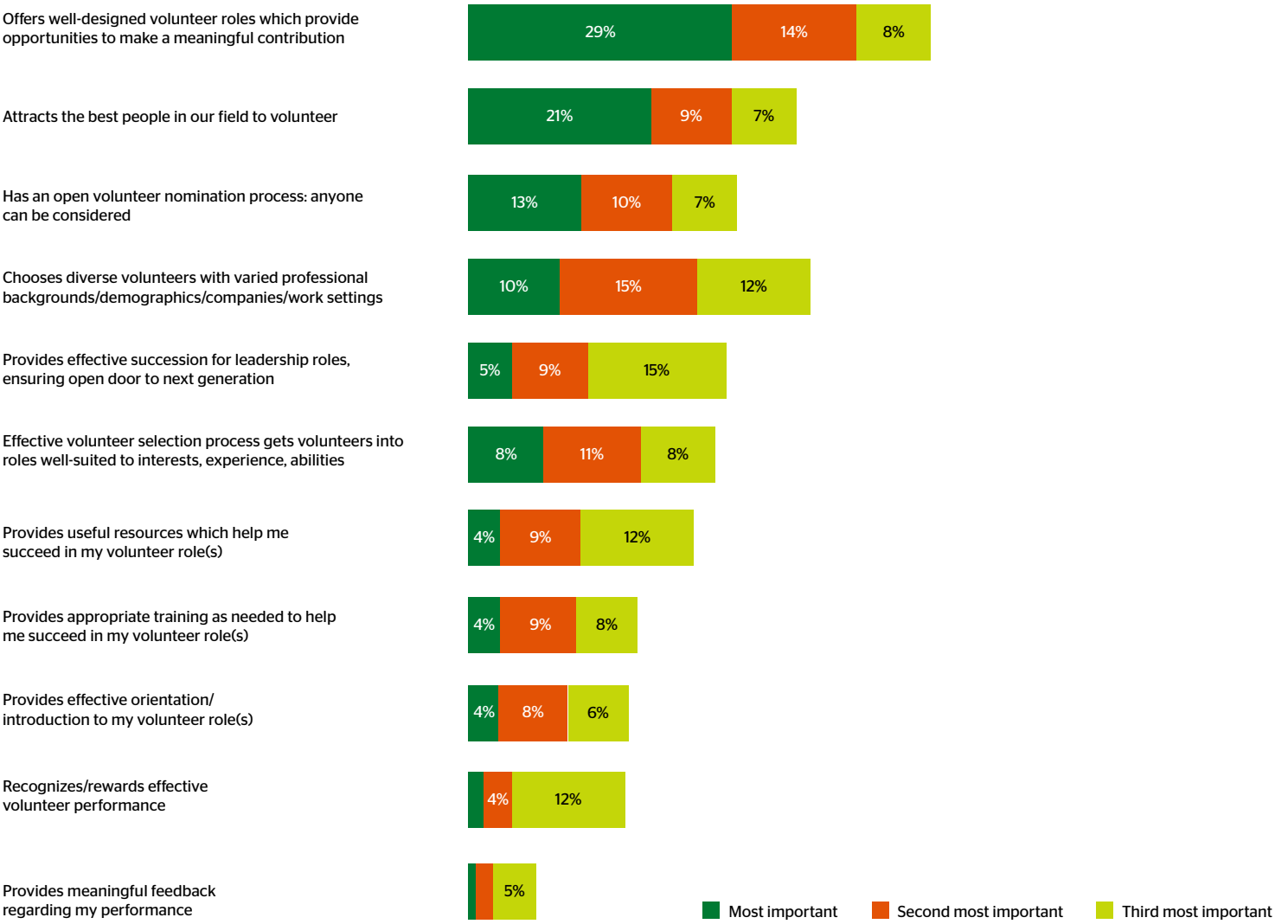
Volunteers were asked to indicate, regardless of how well their organization is performing, which elements of an association’s volunteer system were most important.

Offering well-designed volunteer roles that provide opportunities to make a meaningful contribution, which had the second-highest satisfaction rating, has the highest proportion rating it most important (29 percent, and half of volunteers regard it among the three most important elements.

Attracting the best people in the field to volunteer (21 percent), having an open volunteer nomination process (13 percent), choosing diverse volunteers (10 percent), and an effective volunteer selection process (8 percent) are the other elements rated most important by a reasonable number of volunteers.

All other elements collectively are regarded as most important by 19 percent, with a few of them having between 20 percent and 30 percent regarding them among their top three. These include effective succession for leadership roles, providing useful resources to help them succeed in my volunteer roles, appropriate training, and effective orientation/ introduction to their volunteer roles.

Figure 44. Most Important Activities Employed by Associations Manage Volunteers



Source Volunteer Experience Survey: Which are the three most important elements of the volunteer system for you regardless of how well it is performing in that area? Rank from most important to third-most important.

## Detailed Findings

### Satisfaction with Attributes of Organization's Volunteer System

The highest-rated attributes of their organization's volunteer system include the quality of association staff who serve as liaisons or coordinators of activities (4.38, working with others toward a common goal (4.36, and quality of the volunteer leadership of their committees (4.29). Each have at least 50 percent very satisfied or 80 percent combined very and somewhat satisfied, but each feature also has 9-11 percent who are neither satisfied or dissatisfied and a few who are dissatisfied.

Five other rated attributes are rated well above 4.0: helping them feel that they are giving back to their industry or profession (4.25, receptivity of association staff to their recommendations (4.20, ability to debate or discuss issues openly in a manner that reaches conclusions while vetting opposing viewpoints (4.19, reasonableness

of time commitment required (4.19), and convenient timing of their calls or in-person meetings (4.15).

Overall, satisfaction with the volunteer management system is 4.03, the numeric equivalent of "somewhat satisfied" but also toward the bottom of these admittedly high scores. More are very satisfied (39 percent) than somewhat satisfied (34 percent), with 15 percent neither satisfied or dissatisfied and 9 percent dissatisfied.

The average scores for three qualities are in this same range, with making effective use of time and talent given by them and their peers (4.01), genuine concern shown regarding the quality of experience that they have as volunteers (3.95), and extent to which the organization provides volunteer experiences that motivate them and make them want to stay engaged (3.94) rated lowest within the list of attributes.

**Figure 45. Satisfaction of Specific Attributes of an Association or Affiliate's Volunteer System**



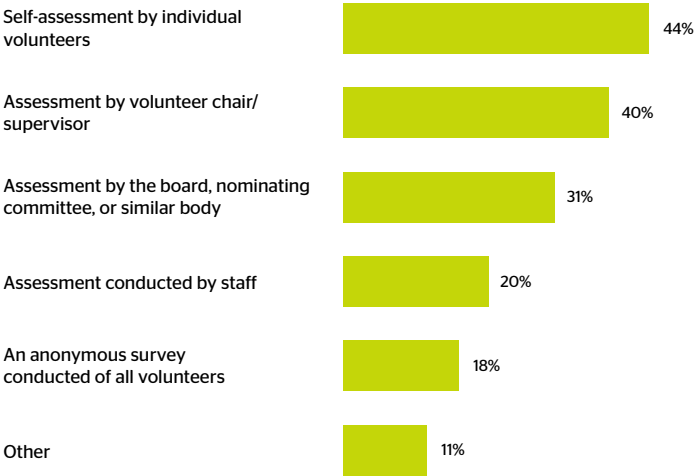
Source Volunteer Experience Survey: How satisfied are you with the following attributes of the organization or affiliate's volunteer system? Please rate on a scale 1-Very dissatisfied, 2-Somewhat dissatisfied, 3-Neither satisfied nor dissatisfied, 4-Somewhat satisfied, or 5-Very satisfied. If unsure, select N/A.

Extent that Evaluations are Used to Improve Performance

Volunteers report that performance evaluations are rare—11 percent of all, including 12 percent of direct-organization and 7 percent of affiliate volunteers, report having a formal or informal evaluation in roles that they serve.

**Method of conduct**—Among those who have evaluations, self-assessment (44 percent) is most common, compared to one conducted by the volunteer chair or supervisor (40 percent) or the board or a nominating committee-type body (31 percent). Only 20 percent report that staff conduct an assessment, and 18 percent participate in an anonymous survey among all volunteers.

Figure 46. Methods Used to Formally/Informally Assess Volunteer Performance

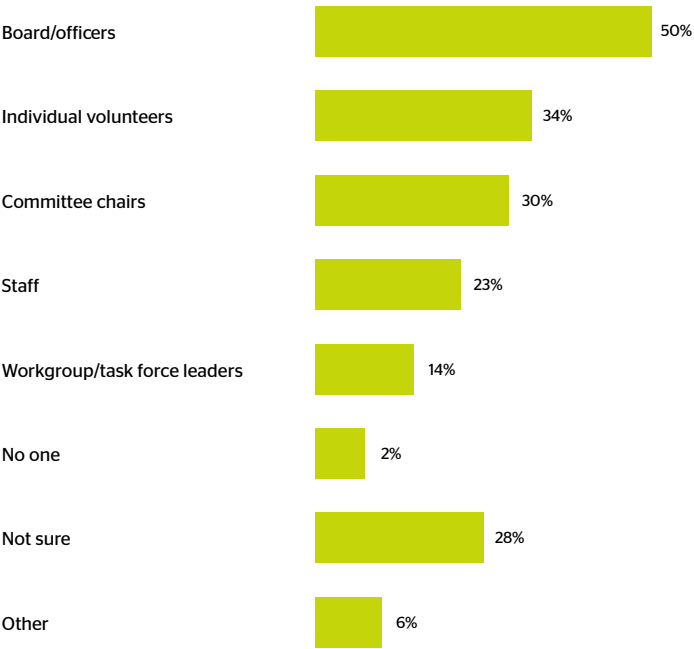


Source: Volunteer Experience Survey. [Of respondents who indicated the organization or affiliate conducts a formal/informal evaluation of volunteer performance] How are these evaluations conducted? Select all that apply.

**How shared**—Evaluations are, to the best of the volunteer's knowledge, shared with other volunteer decision makers including the board or officers (50 percent), committee chairs (30 percent), and workgroup or task force leaders (14 percent).

Some also reported findings are shared with individual volunteers (34 percent) and/or staff (23 percent), while a considerable number are unsure (28 percent).

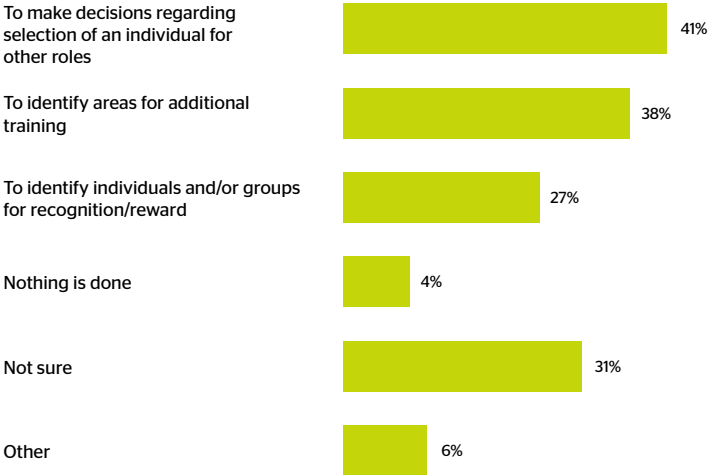
Figure 47. With Whom Formal/Informal Assessments are Shared



Source: Volunteer Experience Survey. [Of respondents who indicated the organization or affiliate conducts a formal/informal evaluation of volunteer performance] With whom are these evaluations shared? Select all that apply.

**How used**—Evaluations are generally used to make decisions regarding selection of an individual for other roles (41 percent, identify training areas (38 percent, or identify individuals or groups for recognition or reward (27 percent. As with other questions, a substantial proportion (31 percent are unsure, while 4 percent say nothing is done with the results.

Figure 48. Use of Assessments within the Association

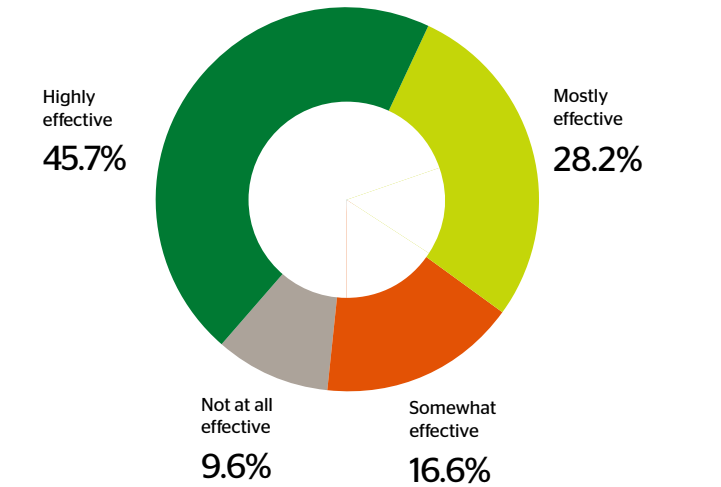


Source Volunteer Experience Survey: If conducted, to what extent are the results of these evaluations (regardless of how conducted or shared) used to improve the performance of individual volunteers or volunteer groups? Select all that apply.

Self-Assessment of Volunteers

When asked to estimate what proportion of volunteers in their association have specific attributes, volunteers state that a mean of 46 percent are highly effective and 28 percent are mostly effective. In their observation, only 17 percent are somewhat and 10 percent not at all effective. This is an impressively higher overall rating than what staff estimated.

Figure 49. Perceived Effectiveness of Volunteers



Source Volunteer Experience Survey: What percentage of volunteers in your association would you estimate are highly effective, mostly effective, somewhat effective, or not at all effective? Please provide answers for the total equals 100 percent.

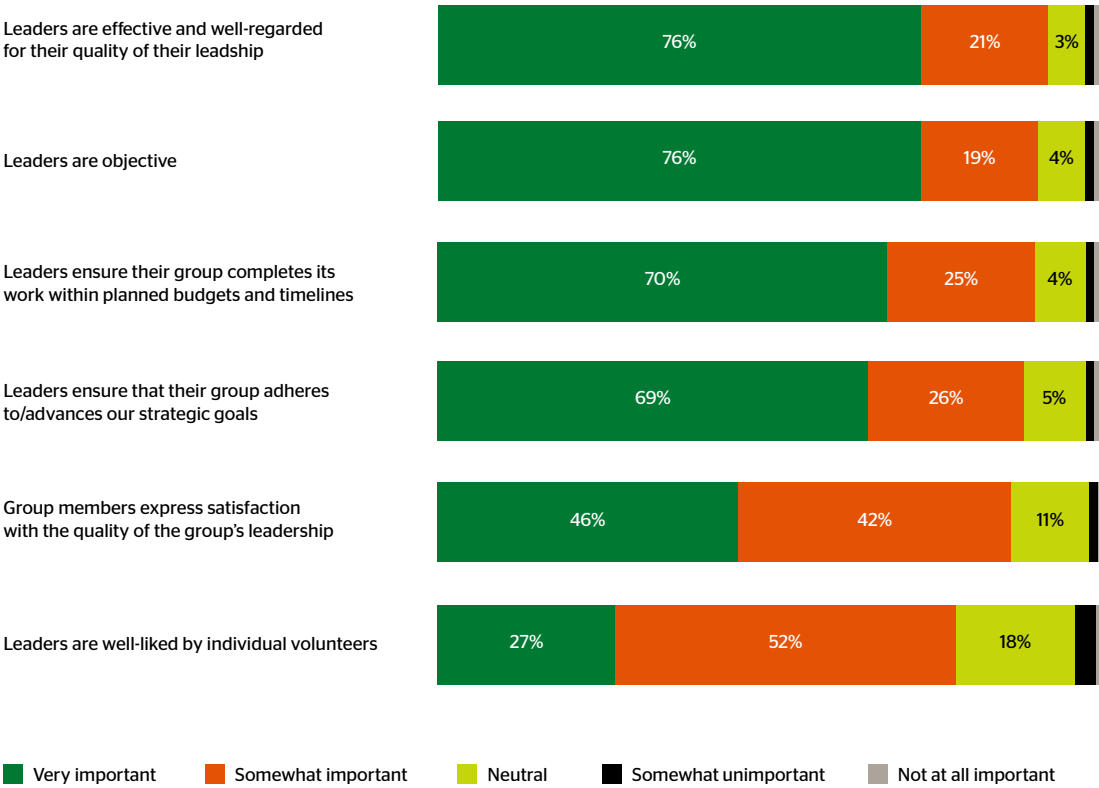


Important Attributes for Effective Volunteers

**Leaders**—Volunteers believe that most attributes for leaders are very important. Being effective and well-regarded for their quality of leadership (4.73, being objective (4.71, ensuring that their group completes its work within planned budgets and timelines (4.65 and ensuring that their group adheres to or advances strategic goals (4.63 all have at least two thirds rating them very important and most of the remaining respondents rating them somewhat important.

The two qualities rated lower are satisfaction with quality of the group's leadership (4.32 and particularly that leaders are well-liked by volunteers (4.02

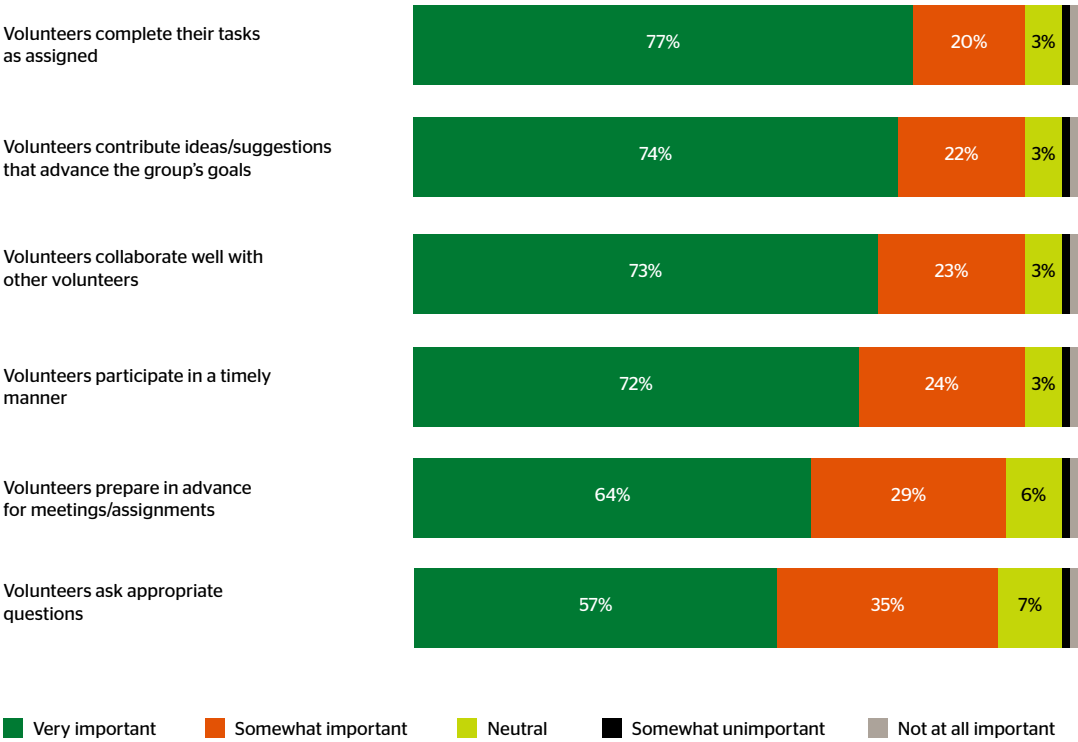
Figure 50. Importance of Specific Attributes of Effective Volunteer Leaders



Source Volunteer Experience Survey: In your opinion, how important are the following attributes for effective volunteers? Please rate on a scale 1-Not at all important, 2-Somewhat unimportant, 3-Neutral, 4-Somewhat important, or 5-Very important.

**Individual volunteers**—The idea that everything matters is even more universal for individuals. Completing tasks as assigned, contributing ideas or suggestions that advance group goals, collaborating well with other volunteers, and timely participation (4.73–4.68, preparing in advance for meetings and assignments (4.57, and asking appropriate questions (4.48 are all universally respected.

Figure 51. Importance of Specific Attributes of Effective Individuals

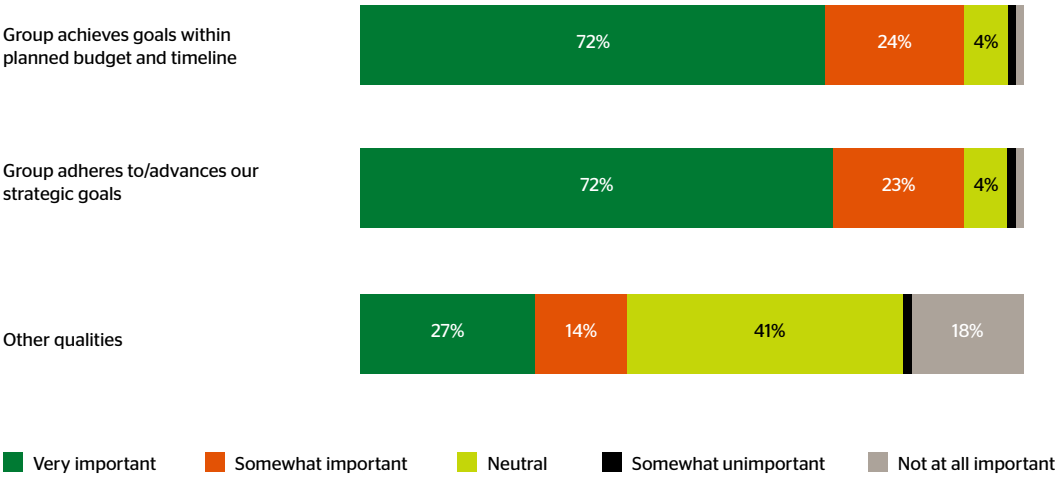


Source Volunteer Experience Survey: In your opinion, how important are the following attributes for effective volunteers? Please rate on a scale 1-Not at all important, 2-Somewhat unimportant, 3-Neutral, 4-Somewhat important, or 5-Very important.

Important Attributes for Effective Volunteer Groupsp

The two group goals—adhering to or advancing strategic goals and achieving goals within planned budget and timeline—have identical 4.66 average scores and 72 percent each saying they are very important. A provision for other qualities had substantially fewer respondents and represented an interesting grab bag of additional goals that we categorize in the appendix.

Figure 52. Importance of Specific Attributes of Effective Volunteer Groups



Source Volunteer Experience Survey: In your opinion, how important are the following attributes for effective volunteers? Please rate on a scale 1-Not at all important, 2-Somewhat unimportant, 3-Neutral, 4-Somewhat important, or 5-Very important.

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## Characteristics of Excellence for an Association Volunteer Model

These principles support and sustain mutually beneficial volunteer involvement in the mission and work of our associations and are those seen in associations that generally rate their volunteers as effective. The principles should be viewed in part as aspirational, for several factors influence an association's ability to address one or more of the principles. Association leaders may also find that at any given point in time, they perform better or worse on one or more of the elements, as associations are in constant flux.

<b>Organizational culture of volunteerism</b>	Creating a culture of volunteerism within the organization among both members and staff—that embraces volunteerism while also providing necessary resources to meet the needs of the organization, the staff, and the member volunteers and to ensure the association is balancing appropriate legal and operational authority between volunteers and staff.
<b>Clarity of purpose and definition of high performing</b>	Creating the organization's purpose statement for engaging volunteers, in which the organization clearly articulates the impact of a successful volunteer strategy.
<b>Holistic and transparent volunteer system infrastructure</b>	Embracing a holistic and transparent volunteer resources management system that addresses the six key elements of job design, recruitment and selection, orientation and training, management, assessment, and reward and recognition, and which is aligned with the organization's culture and systems.
<b>Commitment to continuous improvement</b>	Embedding into the volunteer system regular and ongoing assessment and modernization practices. This should consist of multiple approaches including a (1) system-wide assessment, (2) individual group and program assessments, (3) assessment of individual volunteer learning, satisfaction, readiness, and contribution, (4) stress tests for DEI, time to decision, and strategic focus, and (5) updating volunteer systems based on learnings of assessment. The intent is to identify and replicate successes, fill performance gaps, and collect relevant benchmarking data to support continuous improvement.
<b>Professional development</b>	Committing to ongoing learning for staff and volunteers about the profession/ trade, nonprofit/association sector, relevant societal and social impact trends, and DEI.
<b>Staff readiness and preparedness</b>	Investing in ongoing training, development, and mentoring of staff to support and be partners with the association's volunteers.
<b>Information and knowledge transfer</b>	Enabling the transfer of necessary information, history, trends, and experiences as volunteers and staff change.
<b>Anticipatory capabilities and responsiveness</b>	Anticipating changes in the profession, association, and society within the context of volunteer management and adapting systems and learning in response.
<b>Resource commitment</b>	Investing in the volunteer strategy to continually evolve and innovate the systems including positively influencing how volunteers are able to complete their role.
<b>Community focus</b>	Committing to building and nurturing the community engaged in the work of the organization; this is about strengthening the personal and professional bonds across the community.
<b>Strong identification and connection to the profession or trade</b>	Tying the volunteering roles to influencing the profession, trade, or sector in a meaningful way.

## Organizational Factors That Influence Governance Priorities

A number of organizational factors can influence governance function and board selection, a select number of which are addressed in this section. Association leaders should understand how these factors influence governance priorities and needs. Such factors include the structure of an organization and its strategic priorities.

Factor	Definition	Implication
<b>Field of activity</b>	The industry or field that the association serves	Changes in industry dynamics plus attributes of successful individuals in the field may have implications for associations.
<b>Organizational and industry culture</b>	The norms of behavior in the association, often influenced by historical and philosophical perspectives	Different norms and culture suggest and limit organizational options and priorities.
<b>Strategy</b>	The overall approach to operating the organization	Different objectives and priorities require different leadership competencies.
<b>Structure</b>	The overall organizational setup and how decisions are made	Different structures require different monitoring, accountability, and appointment mechanisms.
<b>Life stage</b>	The general stage of development for the association	Stages have different strategic priorities.
<b>Size</b>	Organizational size as measured by budget and membership representation	Size is related to structure and life stage and can serve as a proxy for those factors.
<b>Age</b>	Organizational age as determined by years in operation	Age is related to structure and life stage and can serve as a proxy for those factors.
<b>Internal power</b>	This reflects the nature of internal relationships and power dynamics among key internal stakeholders such as the executive and board or other affiliated entities	Governance roles are potentially influenced by powerful actors and might also reflect the ability to implement change initiatives.
<b>Stakeholder power</b>	The power differentials among groups, especially as they relate to the ability to influence organizational practices	Different power relationships among groups require organizations to be sensitive to constituency needs.
<b>Resource dependence</b>	Considers the concentration or diversity of revenue streams	This reflects reliance and dependence on different groups or constituencies.

Source: Brown, W. and Engle M. Excerpt from *Recruit the Right Board: Proven Processes for Selecting Critical Competencies*. ASAE Association Management Press, 2019, pp. 51–52.



## Developing an Effective Volunteer System: A Process Model

This model outlines key steps to undertake in considering an association's volunteer model. While the steps and principles apply across organizational structures (individual membership organization, trade association, etc. and volunteer groups (boards, committees, etc., there is room for individual associations to adapt as appropriate.

**1** Define your organization's philosophy of volunteer involvement to reflect your volunteer purpose statement and capture the values guiding your engagement of volunteers. In the c3 sector this is referred to as the "foundation of a volunteer program," as it captures why volunteers are a strategic human resource for your association. This philosophy guides how an association determines how to best use volunteer involvement. This volunteer purpose statement should align with your organization's value statements.

**2** Identify the desired outcomes for the association's volunteer system. This is where the association defines an effective volunteer program and volunteers based on those outcomes. Here is where an association can then identify the metrics that would objectively measure the actual impact. There are three common areas to consider, each of which is explored in more detail in Volunteer Impact Template below:

**Volunteer outcomes**  
(e.g., professional benefits, personal benefits)

**Organizational outcomes**  
(e.g., operational capacity or capability, external affairs, community or member engagement)

**Member outcomes**  
(e.g., services/products, awareness, contribution)

**3** Assess the current system based on outcomes desired using the metrics identified. One tool to consider is the MBVS Assessment model used in the 2017 Mutually Beneficial Volunteerism research project. It is a survey of both staff and volunteers that provides a view of the system based on the experience and perception of the key stakeholders. Alternatively, or in conjunction with that assessment, an association should explore key questions that affect the effectiveness based on research and practice.

### Exploratory questions

#### Building volunteer capacity

- Are we successfully engaging the right volunteers for the organization, considering volunteer diversity, and meeting the competency needs of the association?
- Are we filling the necessary positions?
- Do we have a diverse, abundant pipeline of volunteers and future leaders?

#### Enhancing the volunteer-staff partnership and experience

- Are we supporting volunteers and staff to have effective relationships and the best experience?
- Are we making effective use of volunteer and staff time?

#### Committing to continuous improvement

- Are we intentionally assessing our volunteer internal management, volunteer experience, and volunteer outcomes?
- Are we monitoring how the organization's needs for volunteerism are changing over time and organizational life cycle?
- Do we have risk mitigation strategies?

#### Volunteer performance

- What is the "time to decision" of your groups; are we making timely decisions?
- What is the effectiveness of decision making by volunteers?
- Are strategic groups acting at a strategic level?

**4** Build out or re-design the volunteer system based on the MBVS Volunteer Resource Management model. This may well be the most complicated of the steps, and associations will approach this based on resources and capacity. The four elements that associations would be best served to focus the system on are

Provide open access by offering a variety of volunteer opportunities (length of commitment, virtual, etc.).

Make best use of volunteer and staff time.

Recognize unconscious bias in job design, recruitment, and selection.

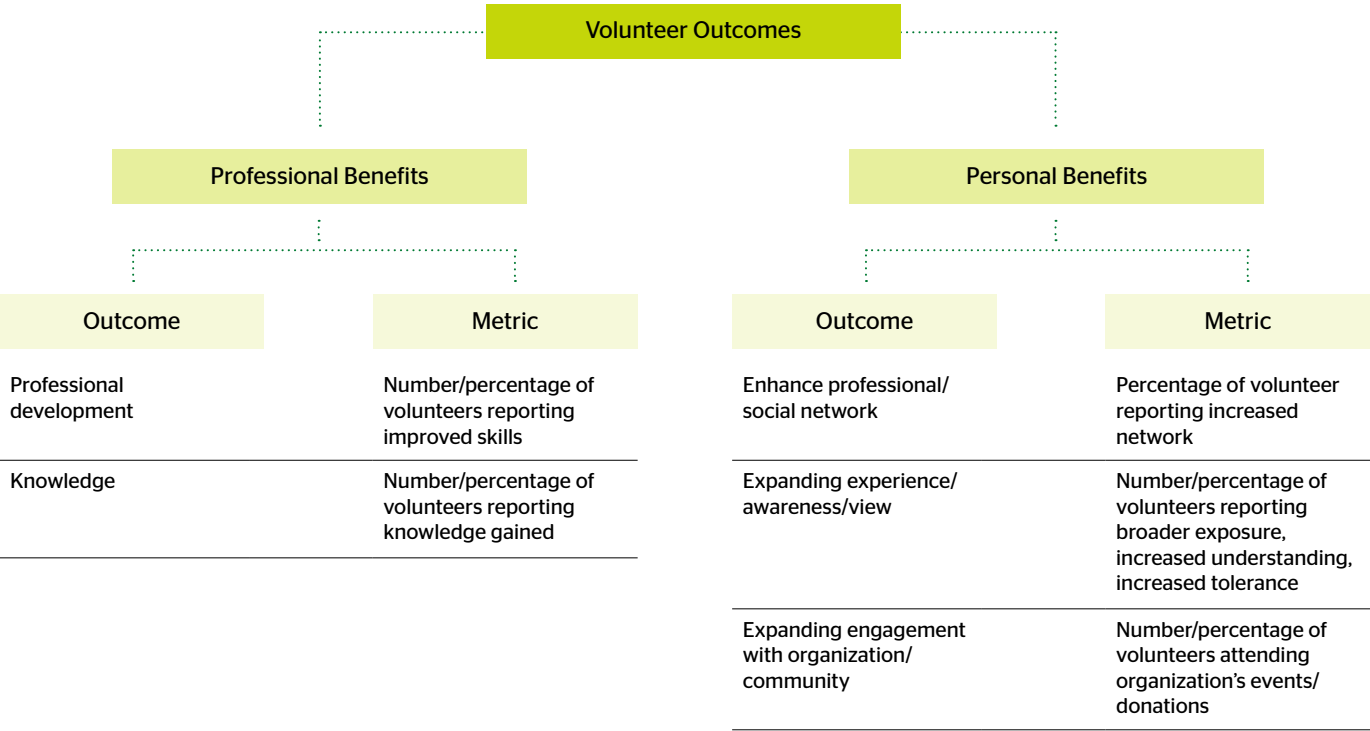
Develop an appropriate assessment process to provide feedback on the organization performance and value of the volunteer system.

Volunteer Impact Template

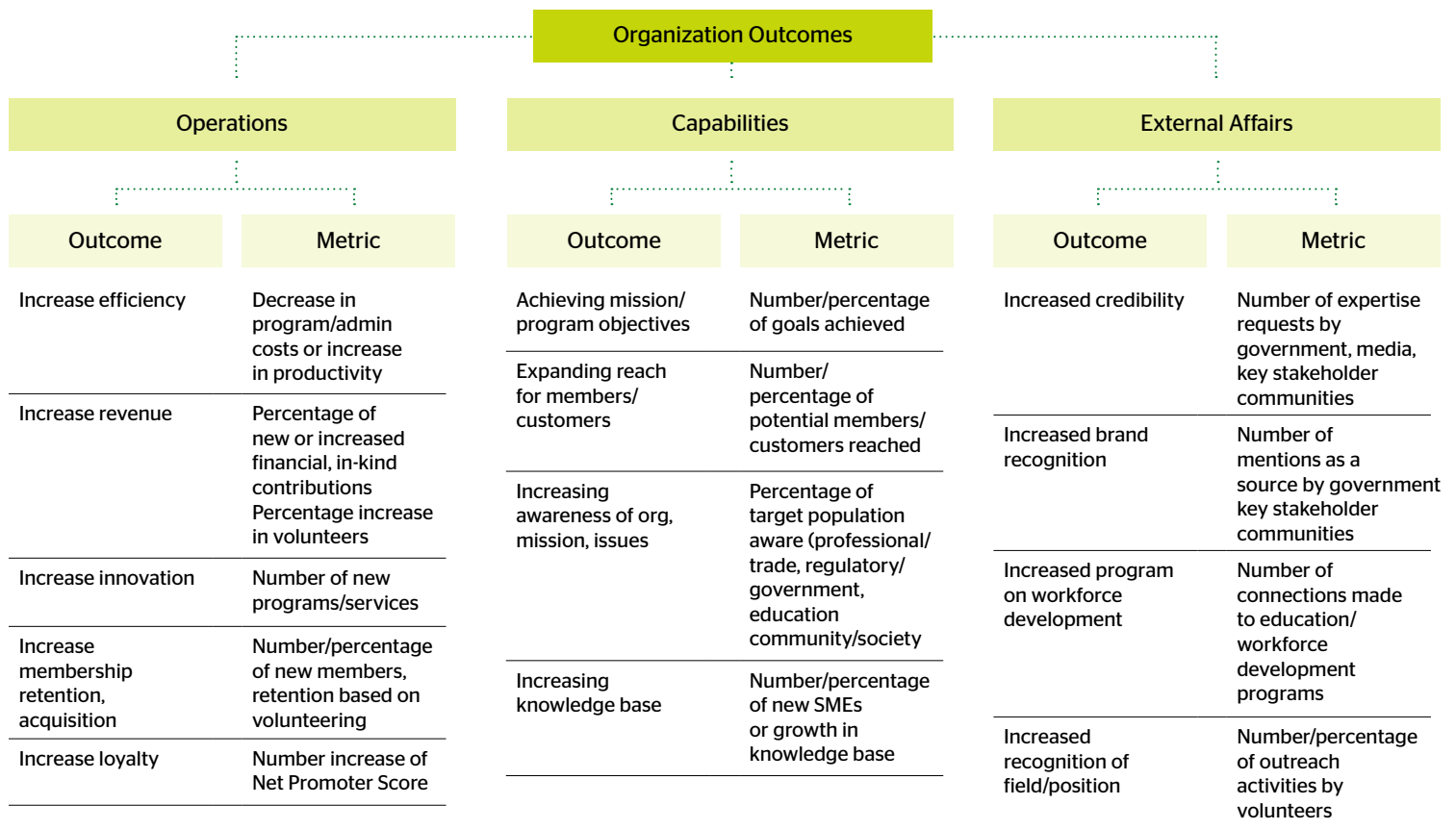
This is designed as a template to provide examples of desired outcomes and potential metrics for measuring achievement of those outcomes. In adapting this template to develop its volunteer system's metrics, associations should use its strategic goals and organizational metrics as the starting point. There are three possible focus areas, each with a number of optional categories, offered here.

This draft framework is adapted from: [Making It Count: How to Measure the Impact of Volunteerism](#), Starbucks and Mission Measurement, 2011. It draws on two additional resources: [Measuring the Impact of Volunteers: A Balanced & Strategic Approach](#), Energize, 2016 and [Value of Volunteering Wheel](#), Volunteer Canada.

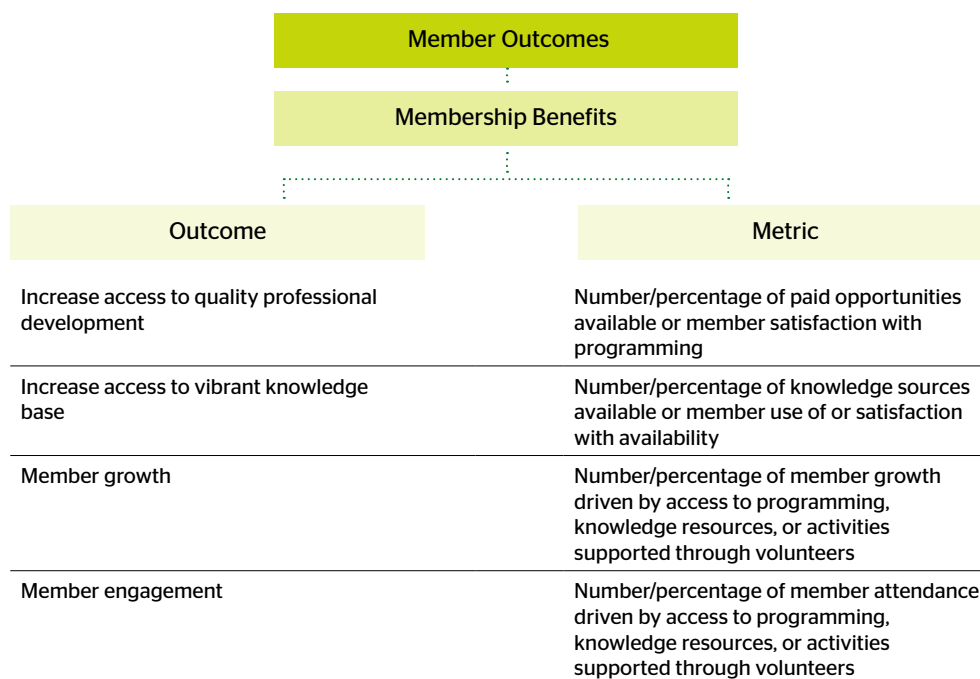
1 Volunteer outcomes: professional and personal benefits



## 2 Organizational outcomes: operations, capabilities, external affairs



## 3 Member outcomes: membership benefits; note that member is used broadly to reference all programs and services provided to members, customers, and key stakeholders as part of a value proposition.



## Mutually Beneficial Volunteer System Key Attributes

Using the HR model as a theoretical construct, associations might consider surveying staff and volunteers on parallel factors to determine gaps and explore options. Key attributes to assess include:

Job Design—Meaningful Work	
<ul style="list-style-type: none"> <li>Fit to mission—How does this fit into the big picture?</li> <li>Goals—What does well-done look like?</li> <li>Resources (Human and Other)—What kind of help/tools does the volunteer get?</li> <li>Flexible—Is this job structured to fit the volunteer's near and long-term schedules/availability?</li> <li>Accessible—To what extent can volunteers perform this job regardless of where they are?</li> </ul>	<ul style="list-style-type: none"> <li>Fit to members—Does this job take advantage of the skills, knowledge, and abilities (SKAs) most likely possessed by the volunteers?</li> <li>Tasks to be performed—What will the volunteer be doing?</li> <li>Time required to complete tasks—How long will it take?</li> <li>SKAs required—Does the volunteer have what it takes?</li> <li>Appropriate—Should we hire for this job?</li> </ul>
Recruitment and Selection—Right Person for the Job	
<b>Volunteer Profile Registry</b> <ul style="list-style-type: none"> <li>Is there one?</li> <li>Is it tied to job descriptions?</li> <li>Does it list current openings?</li> <li>Does it detail the selection criteria/process?</li> </ul>	<b>Outreach</b> <ul style="list-style-type: none"> <li>One-to-many (web/email/SM)</li> <li>Many-to-many (volunteer to member, member to member)</li> <li>One-to-one (volunteer to member, member to member)</li> </ul>
<ul style="list-style-type: none"> <li>Who selects?</li> <li>How do they decide?</li> <li>What if no one makes the grade?</li> <li>DEI? Noah's Ark or best qualified?</li> </ul>	
Orientation and Training—Need to Know	
<ul style="list-style-type: none"> <li>How steep/long is the learning curve?</li> <li>To what extent does the O&amp;T focus on the bare essentials?               <ul style="list-style-type: none"> <li>Activity-specific</li> <li>General organization info</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Are there multiple options (times/channels/etc.) volunteers can use to get up to speed?</li> <li>How well does the system track volunteer turnover and bring newbies up to top speed?</li> </ul>
Management and Mentoring—Ongoing Support	
<ul style="list-style-type: none"> <li>Does each volunteer have a supervisor and/or mentor?</li> <li>What, if any, training does the supervisor/mentor receive?</li> <li>What is the ratio of volunteers to supervisors/mentors?</li> </ul>	<ul style="list-style-type: none"> <li>How are performance issues addressed?</li> <li>What is the volunteer's recourse when things aren't as expected?</li> </ul>
Assessment—Constructive Feedback	
<ul style="list-style-type: none"> <li>Who assesses?               <ul style="list-style-type: none"> <li>Self (i.e., the volunteer)</li> <li>Supervisor/Mentor</li> <li>Other(s)</li> </ul> </li> <li>How often?               <ul style="list-style-type: none"> <li>Weekly</li> <li>Monthly</li> <li>Quarterly</li> <li>Semi-annually</li> <li>Other</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>What are the criteria? How are they scored?</li> <li>How are the evaluations recorded and stored?</li> <li>How often are the evaluations reported? To whom?</li> <li>How is underperformance addressed?</li> <li>Who reviews the assessments/assessors?</li> </ul>
Compensation—Extrinsic and Intrinsic Recognition and Reward	
<p>How are volunteers acknowledged?</p> <ul style="list-style-type: none"> <li>Is the acknowledgement generic or personal? Public or private?</li> <li>To what extent does the acknowledgement differentiate between “just showing up” and “doing a great job”?</li> </ul> <p>How soon after the performance of the activity is the performance recognized/rewarded?</p>	

## Mutually Beneficial Volunteer System Scoring Tool

### Staff answer using 5-point scale

5 = Always true  
 4 = Usually true  
 3 = Sometimes true/sometimes untrue  
 2 = Usually untrue  
 1 = Never true  
 0 = NA/do not use

### Volunteers answer based on overall volunteer experience using 5-point scale

5 = Strongly agree  
 4 = Agree somewhat  
 3 = Neither agree nor disagree  
 2 = Somewhat disagree  
 1 = Strongly disagree  
 0 = NA/I did not receive

Avg columns list average scores for staff and volunteers respectively.

Diff column displays staff score minus volunteer score.

### Job Design—Meaningful Work

	Staff	Avg	Volunteers	Avg	Diff
A1	Our volunteers understand how their jobs fit into the big picture/mission.		I understand how my job fits into the big picture/mission.		
A2	Our volunteers know what a job well-done looks like.		It is clear to me what a job well-done looks like.		
A3	Our volunteers know what kind of resources are available to help them do their jobs.		I know what kind of resources are available to help me do their jobs.		
A4	Our volunteers' jobs are designed to fit their schedules/availability.		The volunteer job I am asked to perform fits my schedule/availability.		
A5	Our volunteers can perform their jobs regardless of where they are.		I can perform their jobs regardless of where I am.		
A6	Our volunteer jobs take advantage of the SKAs most likely possessed by our volunteers.		My volunteer job takes advantage of my skills, knowledge, and abilities.		
A7	Their job responsibilities are clear to our volunteers.		The responsibilities of my volunteer job are clear to me.		
A8	The amount of time that will be required to complete their job is clear to our volunteers.		It is clear how long it will take to complete my volunteer job.		
A9	Our volunteers believe they have the skills, knowledge, and abilities required for their jobs.		I believe I have the skills, knowledge, and abilities required to do my volunteer job.		
	Subtotal (Average)		Subtotal (Average)		

## Recruitment and Selection—Right Person for the Job

	Staff	Avg	Volunteers	Avg	Diff
B1	Our volunteers are aware of the opportunities available.		I was fully aware of the opportunities available.		
B2	We make a personal/one-to-one ask for volunteers.		I received a personal/one-to-one ask to volunteer.		
B3	Our volunteers understand how to get considered for a volunteer position.		I know what I have to do to be considered for a volunteer position.		
B4	We acknowledge our volunteer applications in a timely fashion.		The association acknowledges my volunteer application in a timely fashion.		
B5	Our volunteers understand the selection criteria and process by which positions are filled.		I understood the selection criteria and process by which volunteer positions are filled.		
B6	Our volunteers believe the selection process and criteria by which positions are filled is fair.		I believe the selection process and criteria by which volunteer positions are filled is fair.		
B7	Our volunteers know who decides if they get a job.		I know who decided if I got the job.		
B8	Our volunteers are informed they did or did not get the job in a timely fashion.		I was informed in a timely fashion if I got the job one way or the other.		
	Subtotal (Average)		Subtotal (Average)		

### Orientation and Training—Need to Know

	Staff	Avg	Volunteers	Avg	Diff
C1	Our volunteer orientation provides a good understanding of the scope and purpose of our volunteer jobs.		My orientation provided a good understanding of the scope and purpose of my job.		
C2	Our volunteers receive sufficient training to perform their jobs successfully.		I received sufficient training to perform my volunteer job successfully.		
C3	Our volunteer training is delivered in a timely fashion.		The training was delivered in a timely fashion.		
C4	The training is tightly focused on the knowledge and skills required to perform the jobs as defined.		The training was tightly focused on the knowledge and skills required to perform my volunteer job.		
C5	The training is available on a schedule that is convenient for our volunteers.		The training was available on a schedule that was convenient for me.		
C6	The training is available through multiple channels (online, classroom, real time, asynchronous).		The training was available through multiple channels (online, classroom, real time, asynchronous).		
C7	It is clear to our volunteers when they have successfully completed a training program.		It was clear to me when I successfully completed the training program.		
	Subtotal (Average)		Subtotal (Average)		

### Management and Mentoring—Ongoing Support

	Staff	Avg	Volunteers	Avg	Diff
D1	Our volunteers have a supervisor or mentor who provides guidance as needed.		I have a supervisor or mentor who provides guidance as needed.		
D2	The supervisor/mentor helps our volunteers navigate the association's unwritten rules and understand the cultural norms.		My supervisor/mentor helps the association's unwritten rules and understand the cultural norms.		
D3	The supervisor/mentor helps our volunteers identify their most appropriate roles.		My supervisor/mentor helps me identify the most appropriate roles for me.		
D4	The supervisor/mentor helps our volunteers move forward in their volunteer careers.		My supervisor/mentor helps me move forward in my volunteer career.		
D5	The supervisor/mentor helps our volunteers adjust their expectations and/or performance when things don't go as well as hoped.		My supervisor/mentor helps me adjust my expectations and/or performance when things don't go as well as I had hoped.		
	Subtotal (Average)		Subtotal (Average)		

### Assessment—Constructive Feedback

	Staff	Avg	Volunteers	Avg	Diff
E1	It is clear to our volunteers when they have done their job well.		It is clear to me when I have done my job well.		
E2	Our volunteers understand the criteria by which their performance is evaluated.		I understand the criteria by which my performance is evaluated.		
E3	Our volunteers know who conducts their evaluation.		I know who conducts the evaluation.		
E4	The evaluation provides feedback our volunteers can use to improve their performance (if needed).		The evaluation provides feedback I can use to improve my performance (if needed).		
E5	Our volunteers receive performance feedback in a timely fashion.		I receive performance feedback in a timely fashion.		
	Subtotal (Average)		Subtotal (Average)		

### Compensation—Extrinsic and Intrinsic Recognition and Reward

	Staff	Avg	Volunteers	Avg	Diff
F1	Our volunteers feel their work is recognized and appreciated.		I feel my work is recognized and appreciated.		
F2	Our volunteers receive personal recognition for their work.		I receive personal recognition for my work.		
F3	Our volunteers receive appropriate recognition before their peers.		I receive appropriate recognition before my peers.		
F4	Our volunteers receive recognition in a timely fashion.		I receive recognition in a timely fashion.		
F5	The recognition our volunteer receive reflects their personal interests/needs.		The recognition I receive reflects my personal interests/needs.		
F6	The recognition our volunteers receive reflects how well they did their job.		The recognition I receive reflects how well I did my job.		
	Subtotal (Average)		Subtotal (Average)		
	<b>Overall Average</b>		<b>Overall Average</b>		



## Individual Interview Participant Profile and Additional Themes

### Individual Interview Participant Profile

Thirty association professionals participated in interviews conducted between August and October 2021 with interviews lasting on average 30–45 minutes. Individuals included in the interviews represented a range of working relationships with volunteers. Additionally, associations included in the interview pool covered the full range of association types and sizes. Profile information reported by the individuals during a pre-screening process can be found in the below.

*Table 11. Individual Interview Participant Profile*

Role in Working with Volunteers	
Chief staff officer with oversight	9
Staff Liaison to volunteer group(s)	7
Manager or coordinator for volunteer engagement	6
Component relations professional (CRP)	3
Other	5
Type of Association	
Trade association	8
Professional society	16
Combined trade and professional	3
AMC	1
Other	2
Staff Size	
Large (50+)	11
Medium (10–49)	10
Small (0–9)	9
Number of Members	
Fewer than 300	1
300–1,000	5
1,001–4,000	9
More than 4,000	15

Number of Volunteers	
Fewer than 300	9
301–1,000	14
1,001–3,000	4
More than 3,000	1
Don't know/unsure	2
Type of Membership Offered	
Individual	15
Organizational	8
Both Individual and organizational	7
Type of Volunteer Opportunities Offered	
Governance (board and committees)	28
Task forces (short-term workgroups)	26
Episodic or micro-volunteering	18
Issue-based (based on issue)	23
Interest-based (e.g., women, young professionals)	20
Discipline-based (e.g., research & membership)	20
Geographically based (e.g. chapters, sections)	13
Association Headquarters	
Northeast	13
Midwest	3
South	12
West	2

Source: Effective Holistic Volunteer Management Models Research, Individual Interviews

## Individual Interview Additional Themes

### Common Challenges

- Volunteer participation often does not reflect the full membership.
- Most associations struggle with the volunteer pipeline, pathways to leadership, and talent development.
- Some associations cannot find sufficient volunteers and must take anyone who steps forward. Other associations have abundant volunteers but lack transparency in the recruitment and selection process.
- COVID has contributed to challenges in recruiting and retaining volunteers.
- Staff must juggle supporting volunteers with other responsibilities, and most indicated they have had little or no formal training related to managing volunteers.
- Group dynamics, individual personalities, and a lack of continuity consume volunteer management time and impact volunteer performance.
- Staff struggle to find sufficient time and resources to adequately orient and train volunteers.
- Volunteer groups often fail when there is a lack of focus or clarity about the group's role and direction.
- Staff are sometimes frustrated with not having input in volunteer selection. (e.g., volunteers elected or appointed solely by members).

### Wish List Items if More Time/Resources Were Available

- Develop a more formal structure for volunteer management.
- Introduce more micro-volunteer opportunities.
- Offer more training and bring volunteers up to speed faster.
- Increase personnel or resources to do the administrative and logistics tasks, leaving volunteers the substantive and strategic work.
- Pay more attention to DEI.
- Create more opportunities for younger or newer volunteers to mix in with the long-standing and experienced volunteers.
- Bring people together more often. Help chapters have more of a national focus and encourage them to work across regions.
- Collect more data on volunteers and analyze the data to support the volunteer program.
- Build better dashboards for volunteer groups.
- Conduct more surveys to help justify the volunteer experience.
- Unify data into one system.
- Thank and recognize volunteers more.

### Changes in Volunteer Systems

- Fifteen of the 30 organizations in the interview pool have made significant changes to their volunteer programs in the last five years. These include
- Focused more on DEI
- Made call for volunteers more open and transparent
- Added more leadership development
- Changed governance structure
- Added micro-volunteering opportunities
- Streamlined volunteer communications
- Added virtual volunteering opportunities
- Increased focus on younger volunteers and mentorship for knowledge transfer
- Rebranded an ambassador program
- Reviewed volunteer recognition activities
- Created a new set of volunteer resources housed on the association's website
- Doubled the volunteer pool in the last year
- Added new committees focused on new initiatives
- Restructured committees according to services
- Increased coordination of data
- Formalized a call for volunteer process
- Shifted focus from impact to relationship building
- Conducted a governance review

### Technologies Used in Volunteer Management

- BoardEffect
- NextWave
- Higher Logic
- SignUpGenius
- SurveyMonkey
- NetForum
- Custom/homegrown
- Matrix Maxx
- Networking platform
- VolunteerMatch

## Focus Group Participant Profile and Themes

Table 12. Focus Group Participant Profile

Role in Working with Volunteers	
Primary staff liaison to volunteer Group(s)	17
Component relations professional	9
Department VP or director	21
Other	7
Type of Association	
Trade association	10
Professional society	30
Combined trade and professional	8
AMC	1
Other	5
Staff Size	
Large (50+)	20
Medium (10-49)	25
Small (0-9)	9
Number of Members	
Fewer than 300	4
300-1,000	0
1,001-4,000	11
More than 4,000	39
Number of Volunteers	
Fewer than 300	21
301-1,000	21
1,001-3,000	7
More than 3,000	3
Don't know/unsure	2
Type of Membership Offered	
Individual	25
Organizational	8
Both Individual and organizational	21

Type of Volunteer Opportunities Offered	
Governance (board and committees)	49
Task forces (short-term workgroups)	44
Episodic or micro-volunteering	28
Issue-based (based on issue)	32
Interest-based (e.g., women, young professionals)	29
Discipline-based (e.g., research & membership)	30
Geographically based (e.g. chapters, sections)	30
Association Headquarters	
Arizona	1
Colorado	5
District of Columbia	9
Illinois	8
Indiana	1
Kansas	1
Maryland	3
Michigan	1
Missouri	1
New York	1
North Carolina	2
Ohio	2
Pennsylvania	1
Texas	1
Virginia	14
Wisconsin	2
Ontario, Canada	1

Source Effective Holistic Volunteer Management Models Research, Focus Groups

### Focus Group Themes

The structure of the focus groups was intended to probe for association practices in understanding and measuring effectiveness. This section summarizes key learnings from the seven groups.

#### Effectiveness

##### Individual Volunteer

- Displays attributes of a good team player: inclusive, does their part, supports others, active participant, personable/liked, gracious, trusted, builds consensus, delegates
- Understands self: strengths, weaknesses, capacity to do the work, motivations, what they don't know
- Understands the association and how the volunteer activity fits into the organization's strategy
- Does the work, e.g., responsive, follows through, prepared, reliable, focused, stays on deadline, stays in their lane, follows policies and procedures
- Aligned with the association: passionate about the profession/industry and the association, in tune with the mission, speaks for the association, advocates for the association, loyal to the association
- Intellectually curious, brings new ideas, thinks outside the box, and provides insights
- Is a subject matter expert knowledgeable about their subject
- Has good project management and business skills and is focused more on outcomes than processes
- Delegates, inspires, and makes the hard decisions

##### Volunteer Group

- Healthy group dynamics: organized, inclusive, collaborative, collegial, considerate, respectful, and people feel comfortable speaking up
- Healthy group operations: organized, clear communication, has defined roles within the group, follows a good decision-making process
- Has clear expectations, goals, authority, and responsibility
- Diversity in skills and perspectives to limit groupthink and “bring power” to the group
- Respects and encourages contributions from all, creates a safe environment for healthy debate, encourages diverse voices
- Has a deep bench of successors

##### Measuring Volunteer Effectiveness

- While few have formal volunteer assessments, most would like to have the tools and time to do more.
- In place of assessments that measure the quality of the volunteer/group, some employ tracking scorecards that count things like engagement or product/project completion.

- If an organization does assess volunteers, they typically include board self-evaluations, board meeting evaluations, and end-product evaluations (events and publications).
- Another subset of evaluation looks at volunteer satisfaction.
- There is some hierarchical member-to-member evaluation with work plans, checklists, and reports submitted to the board.
- Even at the board level, there is little assessment other than board self-evaluation, board meeting evaluation, and a review of board composition during the nomination/election process.
- Most assessment is informal and qualitative. Staff often keep off-the-record volunteer evaluations that are not intended to be shared with volunteers.
- There is general discomfort with having volunteer assessments in writing. Similarly, there is strong consensus that any feedback given to volunteers must be a member-to-member conversation.
- One participant shared that the anecdotal comments are problematic for the staff manager. The unwritten conversation in the background that says “no” to the volunteer makes it challenging for the staff manager to convey why the organization declined the volunteer.
- There appears to be a “check the box” approach to volunteer assessments, with many evaluations being simply filed and not acted upon. When reviewed, it is generally by staff who are looking for emerging topics or gaps in training.

##### When Volunteers Aren't Effective

- Staff are hesitant to explicitly address poor-performing volunteers and generally believe this needs to be addressed as a member-to-member conversation.
- All agreed that it is essential to have systems in place to guide a volunteer to success
- When asked if their organization can tolerate poor volunteer outcomes, participants struggled to answer the question.

##### The Volunteer System

##### Association Systems to Support Volunteers

- Many organizations have reward, award, and recognition programs, but there is a general desire for more opportunities and resources for these programs and a thirst for new ideas.
- There is a wide range of onboarding, orientation, training, and development resources and programs supporting volunteers. Examples include a portal for asynchronous learning modules, coaching and mentoring systems, and leadership development events.
- Most provide committee position descriptions, group charters, charges, checklists, and other guiding documents. They also have regular communications and check-ins to assure volunteers are on track.
- There appears to be significant variation in the level of documented policies and procedures for term limits, applications/nominations, operations

## Appendix II

- Many organizations have clear expectations of staff to support and guide volunteers. However, there is a general sense that there is an insufficient number of well-trained staff liaisons.
- Some organizations explicitly tie volunteer activities to the association's strategic plan.

### Volunteer Recruitment and Training

- Components, particularly chapters, are generally the places where volunteers begin their volunteer journey. Local success -> regional success -> national success.
- There is significant variation in the availability of volunteers. Some organizations struggle with recruiting volunteers across the board and must take all who raise their hand. Other organizations have ample volunteers for specific positions or activities and a shortage of volunteers for functions such as chapters.
- Many associations are looking for strategies to bring in new and younger volunteers
- There is significant variation in the call for volunteers, nomination, and application processes. Some have formal methods that look at competencies and diversity; others are less formal.
- Similarly, there is significant variation in who recruits and selects volunteers with a mix of staff-driven and member-driven processes.
- Most organizations have position descriptions and group charters; however, using these documents in the recruitment process is uneven. Some associations have some form of pre-screening processes, though often fairly informal such as committee chairs interviews.
- There is reliance on good volunteers recruiting others into volunteer positions.
- Most associations conflate volunteer training with onboarding and orientation. Most commonly, the "training" is an orientation, onboarding, and guidance on policies and procedures. Some organizations offer leadership development and soft skills training.
- Many organizations rely on ambassador, buddy, and mentoring relationships where experienced volunteers orient and train new volunteers.

### The Volunteer-Staff Relationship

- The relationship is based on mutual trust and candor.
- Have a shared understanding of the work to be done, the volunteer role, and the staff role.
- Staff actively supports the volunteer/group
- A possible reframing of the relationship would be to focus on the volunteers as the subject matter experts and staff as the organizational experts.

### Challenges With Volunteers and Volunteer Systems

- Sound technology/volunteer management systems
- Consistent volunteer experience across the organization
- Sufficient staff training

- Succession planning and building the pipeline
- Providing sufficient opportunities for volunteers to engage and grow
- Lack of control over volunteer selection and orientation, particularly at the chapter level.
- Sustaining energy between volunteer meetings
- Managing expectations and articulating what is and is not possible
- Sufficient time and tools to support and assess volunteers

### A Volunteer Management Wish List:

#### If you had unlimited resources ...

- Streamline operations and build a better volunteer management infrastructure.
- Reduce or eliminate the administrative burden on volunteers.
- Shift volunteers from tasks to serving as strategic advisors.
- Hire paid staff for certain roles such as publishing.
- Provide more tools, resources, and training; enhance governance training.
- Train staff to better support volunteers.
- Provide stipends to volunteer leaders to cover expenses associated with volunteer service.

### Volunteer Management Questions

At the conclusion of each focus group, participants were provided the opportunity to ask questions or share additional thoughts not covered during the discussion. From these open-ended comments, we found that many opted into the focus groups because improving their volunteer systems is on their mind. They are looking for resources, tools, ideas, guidance, and answers to help them better engage members in the work of the association. A sampling of questions raised:

- What are some non-traditional volunteer structures?
- What are new and innovative ways to reward and recognize volunteers?
- What does it mean to engage volunteers now and in the long run?
- How do you track volunteers who are turned down because you didn't have a place for them at the time?
- How better match volunteers and positions?
- How do you gracefully move out bad volunteers?
- How to address volunteer bullying and harassment?
- How can I effectively manage volunteers with generational differences and different experience levels (new vs. seasoned)?
- What are the best practices for moving volunteers from unengaged to more engaged?
- What are solutions that can work for the small staff association? How can volunteer management practices best be scaled?

## Association Staff Survey Methodology, Respondent Profile, and Tool

The association staff survey was one of two key quantitative data collections in the overall research project. This survey was used to measure the structure and performance of volunteer systems, and to identify a pool of associations willing to participate in a second phase survey to be conducted among their volunteers (241 expressed some interest).

### Methodology

A survey was administered by ASAE Research Foundation among a universe of ASAE member association CEOs, chapter relations professionals, and volunteer/member engagement professionals. One survey was sent per organization. However, if a chapter relations professional was identified, two surveys may have been sent to garner both the organizational view and chapter view of volunteerism. Several messages were sent to encourage them to respond. A total of 661 surveys were submitted with useable data, for a participation rate of approximately 10.8 percent. Respondents

are relatively diverse in terms of budget, structure, scope, total membership, staff, geographic location, and industry.

### Profile of Respondents

Respondents are relatively diverse in terms of budget, structure, scope, total membership, staff, geographic location, and industry.

**Table 13. Association Staff Survey Participant Profile**

Annual Budget	
Mean	\$12.8M
Median	\$7.6M
Less than \$1M	16%
\$1M-\$4.9M	14%
\$5M-\$9.9M	38%
\$10M-\$24.9M	17%
\$25M or more	15%
Membership Structure	
Primarily individuals	54%
Primarily organizations	24%
Hybrid (both organizations and individuals)	18%
Other (non-member/donor-based, etc.)	4%
Scope/Constituency	
National	35%
International/global	29%
State-based	19%
Regional or local	15%
Other	2%

Membership	
All—mean	13,728
All—median	2,750
Individuals—mean	14,863
Individuals—median	3,200
Organizations—mean	1,366
Organizations—median	214
Staff (FTE)E	
Mean	26.8
Median	9
4 or less	31%
5-10	24%
11-25	22%
More than 25	24%
Headquarters Location	
South	48%
Midwest	26%
West	13%
Northeast	13%
Race or Ethnicity	
White	87%
Black or African American	6%
Hispanic, Latino, or Spanish origin	3%
Prefer not to answer	3%
Asian	2%
Bi/Multicultural	2%
Gender Identity	
Woman	65%
Man	33%
Prefer not to answer	2%
Years as an Association Professional	
Mean	19.2

Source: Effective Holistic Volunteer Management Models Research, Association Survey

## Association Staff Survey

Thank you for participating in this ASAE Research Foundation study. This survey is confidential and should take approximately 20 minutes to complete. Topics covered include the following.

1. Your assessment of the success of your volunteer recruitment and management systems
2. How well you are able to recruit new volunteers
3. How you develop, retain, and promote current volunteers

### A. Volunteers: How does your association organize its volunteers?

#### 1. What activities does your organization currently engage in to manage your volunteers? (Respond using the scale 4-Always 3-Often 2-Sometimes 1-Never or Unsure/NA)

- \_\_\_\_\_ We send a direct invitation to all members periodically to encourage volunteering
- \_\_\_\_\_ We provide an orientation process for new and other interested volunteers
- \_\_\_\_\_ We reserve some seats on our Board to ensure full representation of membership segments, such as by demographics, region, areas of specialty, company size, etc.
- \_\_\_\_\_ We have a Board Liaison assigned for committees
- \_\_\_\_\_ We have a systematic workplan to align activities of committees/volunteers to organizational priorities
- \_\_\_\_\_ We have specific staff/department responsible for overall volunteer coordination/management
- \_\_\_\_\_ We have a training and development program for volunteers to provide them the skills needed to fulfill their role
- \_\_\_\_\_ We have a training program for staff to provide them with the skills necessary to manage volunteers
- \_\_\_\_\_ We have strong cross-departmental coordination among staff who manage the work of volunteers
- \_\_\_\_\_ We use an evaluation process to measure the quality of a volunteer's experience
- \_\_\_\_\_ We use an evaluation process to measure the quality of a volunteer's work output

#### 2. Over the past five years (2017-2021), which of the following statements apply to your volunteer and/or component structure(s)? (Select all that apply.)

##### Volunteer Structure

- ☐ We systematically reviewed our volunteer committee structure
- ☐ We substantially changed the mission of one or more volunteer committees
- ☐ We added one or more volunteer committees
- ☐ We eliminated one or more volunteer committees
- ☐ Other significant changes (describe) \_\_\_\_\_
- ☐ None of the above

##### Components Structure (chapters and special interest groups)

- ☐ We do not have chapters
- ☐ We do not have special interest groups
- ☐ We systematically reviewed our component structure
- ☐ We substantially changed the mission of one or more components
- ☐ We added one or more components
- ☐ We eliminated one or more components
- ☐ Other significant changes (describe) \_\_\_\_\_
- ☐ None of the above

#### 3. Thinking back over the past year (January 2021-December 2021) enter the total number of volunteers, committees, and components per section. Where indicated, enter the average number of years. (Feel free to approximate/estimate. If not applicable, leave blank.)

##### Governance Structure

- \_\_\_\_\_ Total number of individuals serving on your Board
- \_\_\_\_\_ Total number of individuals serving on the Executive Committee
- \_\_\_\_\_ Average years that leaders serve in volunteer roles prior to becoming Board Chair/President
- \_\_\_\_\_ Total individuals serving on House of Delegates (if applicable)



### Committee Structure

- \_\_\_\_\_ Total number of standing committees
- \_\_\_\_\_ Total number of individuals serving on all standing committees
- \_\_\_\_\_ Number of workgroups or task forces

### Other National Volunteers

- \_\_\_\_\_ Total number of other individuals serving at a national level in informal roles such as subject matter experts, members of ad hoc working groups and helpers at on-site events

### Component Structure (chapters and special interest groups)

#### Chapter

- \_\_\_\_\_ Total number of geographically defined chapters
- \_\_\_\_\_ Total number of individuals serving in formal/informal roles in chapters

#### Special Interest Groups

- \_\_\_\_\_ Total number of special interest group
- \_\_\_\_\_ Total number of individuals serving in formal/informal roles in special interest groups

### 3. What percent of your current membership would you estimate falls into each of these categories? Include everyone who served in any volunteer role in 2021. (Feel free to approximate. Please answer so that your total adds up to 100%. Leave blank if not applicable.)

- \_\_\_\_\_ Members who are current volunteers (served within the past 12 months, January–December 2021)
- \_\_\_\_\_ Members who are former volunteers (served prior to January 2021 and not between January–December 2021)
- \_\_\_\_\_ Members who have never volunteered

### 100% Total

### 4. Over the past five years (2017–2021) have the total number of members who volunteer at any level increased, decreased, or stayed the same?

- \_\_\_\_\_ Increased
- \_\_\_\_\_ Stayed the same
- \_\_\_\_\_ Decreased
- \_\_\_\_\_ Unsure/NA

### 5. Thinking back over the past year (January 2021–December 2021) enter the total number of staff with volunteer management/coordination responsibility.

**Staff with direct, formal responsibility for coordinating/managing volunteer activities (Board, committees, ad hoc, etc.).** *Examples might include CEO, Education Director, Component Relations Director, Volunteer Manager, Registration Manager, etc.*

- \_\_\_\_\_ Total Staff with direct, formal responsibility
- \_\_\_\_\_ For this group as a whole, estimate the percent of time coordinating/managing the work/activities of the Board/other volunteers

**Other staff with incidental, informal responsibility for coordinating/managing other volunteer work/activities.** *Examples might include those who occasionally rely on volunteers to review a policy recommendation, industry report, or web page design.*

- \_\_\_\_\_ Total Staff with incidental, informal responsibility
- \_\_\_\_\_ For this group as a whole, estimate the percent of time coordinating/managing the work/activities of the Board/other volunteers

### 6. What are two or three specific positions on staff that spend the largest proportion of their time coordinating/managing the work/activities of the Board and other volunteers?

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### 7. Over the past five years (2017–2021) have the following increased, decreased, or stayed the same? (Respond using the scale Increased Stayed the same Decreased or Unsure/NA).

- \_\_\_\_\_ Total number of staff who work with the Board
- \_\_\_\_\_ Total number of staff who work with other volunteers

### 8. Overall, what do you regard as unique or important elements of your organization's management of volunteers?

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### B. Evaluation: How do you assess effectiveness of your volunteers and groups?

#### 1. Which of the following qualities does your organization measure when formally assessing/evaluating the performance of individual volunteers and their groups? (Select all that apply.)

##### Volunteer Leaders

- ☐ We do not formally assess volunteer leaders
- ☐ Leaders are objective
- ☐ Leaders are well-liked by individual volunteers
- ☐ Leaders are effective and well-regarded for the quality of their leadership
- ☐ Leaders ensure their group completes its work within planned budgets and timelines
- ☐ Leaders ensure that their group adheres to/advances our organization's strategic goals
- ☐ Group members express satisfaction with the quality of the group's leadership
- ☐ Other qualities (describe) \_\_\_\_\_

##### Individual Volunteers

- ☐ We do not formally assess individual volunteers
- ☐ Volunteers complete their tasks as assigned
- ☐ Volunteers contribute ideas/suggestions that advance the group's goals
- ☐ Volunteers prepare in advance of meetings/assignments
- ☐ Volunteers participate in a timely manner
- ☐ Volunteers ask appropriate questions
- ☐ Volunteers collaborate well with other volunteers
- ☐ Other qualities (describe) \_\_\_\_\_

##### Volunteer Group (Board, Committee, Task force, etc.)

- ☐ We do not assess them
- ☐ Group achieves goals within planned budget and timeline
- ☐ Group adheres to/advances the organization's strategic goals
- ☐ Other qualities (describe) \_\_\_\_\_

#### 2. If you could assess some qualities that you do not currently assess, what are they?

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#### 3. What percentage of your volunteers would you estimate are the following? (Please answer so that your total adds up to 100%.)

- \_\_\_\_\_ Highly effective
- \_\_\_\_\_ Mostly effective
- \_\_\_\_\_ Somewhat effective
- \_\_\_\_\_ Not at all effective

##### 100% Total

#### 4. What methods does your organization use to formally assess/evaluate the effectiveness of individual volunteers, volunteer leaders, and/or volunteer groups? (Select all that apply.)

##### Volunteer Leaders

- ☐ Self-assessment
- ☐ Assessment by volunteer chair/supervisor
- ☐ Assessment by nominating committee or similar
- ☐ Assessment by staff
- ☐ Anonymous survey conducted of all volunteers
- ☐ Other (please describe) \_\_\_\_\_

##### Individual Volunteers

- ☐ Self-assessment
- ☐ Assessment by volunteer chair/supervisor
- ☐ Assessment by nominating committee or similar
- ☐ Assessment by staff
- ☐ Anonymous survey conducted of all volunteers
- ☐ Other (please describe) \_\_\_\_\_

##### Volunteer Groups

- ☐ Self-assessment
- ☐ Assessment by volunteer chair/supervisor
- ☐ Assessment by nominating committee or similar
- ☐ Assessment by staff
- ☐ Anonymous survey conducted of all volunteers
- ☐ Other (please describe) \_\_\_\_\_

### 5. With whom do you share these evaluations?

(Select all that apply.)

- ☐ Board/Officers
- ☐ Workgroup/task force leaders
- ☐ Staff
- ☐ The individual volunteers
- ☐ Committee chairs
- ☐ Other (please describe) \_\_\_\_\_
- ☐ No one

### 6. How does your organization use these evaluations?

(Select all that apply.)

- ☐ To determine if a volunteer is qualified for another role
- ☐ To assess the success/effectiveness of our overall volunteer system
- ☐ To identify and potentially replicate practices of high performing individuals or groups
- ☐ As a tool for individual volunteer's personal reflection/introspection
- ☐ To identify shortcomings/needs for individual training & development
- ☐ To identify shortcomings/needs for group training & development
- ☐ Other (please describe) \_\_\_\_\_
- ☐ None of the above

### 7. Would you replace some of your current volunteer workforce with paid staff if funding permitted it?

- ☐ Yes
- ☐ No
- ☐ Unsure

### 8. If so, in what operational areas would replace volunteers with paid staff?

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### C. Rating Your Volunteer Environment: How well does your organization's volunteer management work? Please share your subjective opinions regarding your organization's performance.

#### 1. In your opinion, how would you rate the following? (Respond using the scale 5-Excellent 4-Good 3-Average 2-Fair 1-Poor or No Opinion)

##### Our organization's ability to identify and recruit:

- \_\_\_\_\_ The best qualified potential volunteers
- \_\_\_\_\_ Future leaders in our field
- \_\_\_\_\_ An inclusive and diverse pool of volunteers overall
- \_\_\_\_\_ A representative cross-section of individual demographics
- \_\_\_\_\_ A representative cross-section of types/size of organizations
- \_\_\_\_\_ A representative cross-section of geographic locations

##### Our organization's ability to:

- \_\_\_\_\_ Leverage the knowledge/expertise of volunteers to make good operational and strategic decisions
- \_\_\_\_\_ Promote debate/discussion among volunteers to influence the organization's decisions, positions, and policies
- \_\_\_\_\_ Provide meaningful, positive experiences to volunteers during their term(s)
- \_\_\_\_\_ Provide high-quality experiences that encourage volunteers to remain engaged in the future

**2. In your opinion, to what extent do you agree with the following statements? (Respond using the scale 5-Strongly Agree 4-Somewhat Agree 3-Neither Agree nor Disagree 2-Somewhat Disagree 1-Strongly Disagree or Unsure/NA)**

- \_\_\_\_\_ Our volunteer position descriptions/designs offer meaningful work and flexible options for completing that work
- \_\_\_\_\_ Our nominations process is fair, allowing everyone equal access to participate as a volunteer
- \_\_\_\_\_ Our volunteer selection process is effective, providing everyone equal opportunity to serve based on merit and potential contributions
- \_\_\_\_\_ Our volunteer communications are effective, helping them understand their roles and motivating them during their service
- \_\_\_\_\_ Our awards and recognition motivate volunteers during their service
- \_\_\_\_\_ Our volunteer system allows those not selected for volunteer service sufficient opportunities to participate/be engaged to some degree
- \_\_\_\_\_ Loyalty and long-term retention are stronger among members who volunteer versus those who do not volunteer
- \_\_\_\_\_ We are satisfied with the quality of work produced by volunteers
- \_\_\_\_\_ We are satisfied with the volume of work produced by volunteers
- \_\_\_\_\_ We earn a good return on investment on what we invest in time and resources managing volunteers in our organization

**3. In your opinion, which of the following statements are true about your association? (Select all that apply.)**

- ☐ We have considerably more qualified volunteers than we can accommodate
- ☐ We have considerably more underqualified volunteers than we can accommodate
- ☐ Turning away potential volunteers over time has led some members to be less engaged in our membership
- ☐ We have to accept some volunteers who are not as committed or qualified (for any reason)
- ☐ We have some categories of members who want to be more engaged (such as suppliers or other non-core members)
- ☐ We have activities/programs still done by volunteers that should be outsourced or managed by staff
- ☐ None of the above

**4. In your opinion, which of the following do you regard as strengths or weaknesses of your volunteer system? Please answer based on your perceptions if you lack any data or systematic evaluation. (Select all that apply.)**

- ☐ High, strategic importance of volunteer work that makes service more appealing
- ☐ Volunteer orientation that is effective
- ☐ Volunteer selection that is based on an objective assessment of qualifications/experience
- ☐ Unreimbursed costs incurred due to volunteer service are within reason
- ☐ Volunteers that are representative and diverse (e.g., geographic location, demographics, business, or professional characteristics)
- ☐ Employers are encouraged to support our volunteers (e.g., reimbursement, paid time off)
- ☐ Volunteer schedule and time requirements are within reason
- ☐ Training/development for volunteers that is effective
- ☐ Term limits that ensure new volunteers are engaged
- ☐ Recognition, visibility, and prestige of volunteers and/or volunteer work that makes service more appealing
- ☐ Committee/leadership roles that rotate either voluntarily or through bylaws
- ☐ Other strength (please describe) \_\_\_\_\_
- ☐ Other weakness (please describe) \_\_\_\_\_

**5. Based on your answers to the previous question, what do you regard as the single greatest *strength* of your volunteer system?**

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**6. Based on your answers to the previous question, what do you regard as the single greatest *weakness* of your volunteer system?**

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**7. To what extent does your volunteer management system positively influence the following? (Respond using the scale 5-To a great extent 4-Quite a bit 3-Somewhat 2-Very little 1-None at all or Unsure/NA)**

- \_\_\_\_\_ Increasing member engagement
- \_\_\_\_\_ Increasing member recruitment
- \_\_\_\_\_ Increasing member retention
- \_\_\_\_\_ Achieving key strategic initiatives
- \_\_\_\_\_ Achieving the mission of our organization

**8. To what extent do you believe the COVID-19 pandemic changed volunteer participation in your organization? (Respond using the scale 5-Substantial increase 4-Some increase 3-No change 2-Some decrease 1-Substantial decrease or Unsure/NA)**

- \_\_\_\_\_ The number of members who are willing to volunteer
- \_\_\_\_\_ The extent to which volunteers are willing to share their time
- \_\_\_\_\_ The extent to which volunteers expect their time to be used effectively
- \_\_\_\_\_ The number of volunteers who are willing to commit to additional terms and/or new roles

**9. Do you feel the changes above will continue after the pandemic has resolved? (Respond using the scale Yes No or Unsure/NA)**

- \_\_\_\_\_ Number of members who are willing to volunteer
- \_\_\_\_\_ Extent to which volunteers are willing to share their time
- \_\_\_\_\_ Extent to which volunteers expect their time to be used effectively
- \_\_\_\_\_ Number of volunteers who are willing to commit to second terms or new roles

**10. Overall, if you could improve specific aspects or qualities of your organization's volunteer management system, what change(s) would you make?**

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**D. Organization Profile: What is your organization's structure and size?**

**1. Select the option that most closely resembles your organization's membership structure. (If you are an AMC, please respond for one of your client associations.)**

- ☐ Primarily organizations as members
- ☐ Primarily individuals as members
- ☐ Hybrid structure with organizational and individual members
- ☐ Nonmember-based organization (e.g., donor- or grant-supported)
- ☐ Other (please describe) \_\_\_\_\_

**2. Enter the total number of members currently served by the organization. (Feel free to approximate. Enter "0" if not applicable.)**

- \_\_\_\_\_ Individuals
- \_\_\_\_\_ Organizations

**3. Select best describes your central organization's scope/constituency.**

- ☐ International/Global
- ☐ Regional
- ☐ National
- ☐ State
- ☐ Local
- ☐ Other (please describe) \_\_\_\_\_

**4. Select your organization's annual budget for the current fiscal year.**

- ☐ Less than \$500 thousand
- ☐ \$500 thousand but less than \$1 million
- ☐ \$1 million but less than \$5 million
- ☐ \$5 million but less than \$10 million
- ☐ \$10 million but less than \$25 million
- ☐ \$25 million but less than \$50 million
- ☐ More than \$50 million

**5. Enter the number of full-time equivalent (FTE) employed by your organization. (Feel free to approximate. Enter "0" if not applicable.)**

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### E. Respondent Profile: Tell us about you.

**1. How many years have you worked as an association professional?** *(This may include time at your current organization as well as any other organization you have worked.)*

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**2. In which state do you, yourself, work or reside?**

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**3. With which gender identity do you most identify?**

- ☐ Woman
- ☐ Man
- ☐ Non-binary/non-conforming
- ☐ Transgender
- ☐ Prefer to self-describe \_\_\_\_\_
- ☐ Prefer not to answer

**4. With which race do you identify?** *(Select all that apply.)*

- ☐ Asian
- ☐ Bi/Multiracial
- ☐ Black or African American
- ☐ Hispanic, Latino, or Spanish origin
- ☐ Native American or Alaska Native
- ☐ Native Hawaiian or Other Pacific Islander
- ☐ White
- ☐ Prefer to self-describe \_\_\_\_\_
- ☐ Prefer not to answer

**Thank you for completing this survey.** Would you be interested in participating in the next phase?

The next phase of the study—a survey of association volunteers—will launch shortly. This survey will engage panels of 500-1000 volunteers each from a variety of organizations to gauge their volunteer experiences. ASAE Research Foundation's consulting team will conduct the survey using each participating organization's branding/email address/name of the sender and assure the privacy of the organization's volunteer information. In return, participating organizations will receive a summary of their findings compared to that of volunteers from all other participating organizations combined.

If you have questions regarding the process, please contact **Peggy Hoffman** of Mariner Management at [phoffman@marinermanagement.com](mailto:phoffman@marinermanagement.com)

### Volunteer Experience Survey Methodology and Tool

The volunteer experience survey was the second of two key quantitative data collections in the overall research project. This survey was used to measure the structure and performance of volunteer systems as perceived by the volunteers themselves. Findings helped to inform overall study findings and recommendations.

#### Methodology

A survey was administered by Whorton Research & Marketing on behalf of the research team to volunteers and members of participating associations. Several messages were sent to encourage them to respond. A total of 6,260 surveys were submitted with useable data from 49 different associations.

#### A. Your Volunteer Activity

##### 1. How have you been formally or informally engaged as a volunteer:

###### Directly for the organization

- ☐ I currently serve as a volunteer directly for the organization
- ☐ I am not a current volunteer but have served in the past directly for the organization
- ☐ I have never served as a volunteer directly for the organization

**With a geographic affiliate (A geographic affiliate can be a chapter, section or similar group of the organization which usually has a separate board of directors, committees, etc.)**

- ☐ I currently serve as a volunteer for an affiliate
- ☐ I am not a current volunteer but have served in the past for an affiliate
- ☐ I have never served as a volunteer directly for an affiliate

##### 2. Please tell us about your experiences:

- \_\_\_\_\_ In what year did you begin working in the profession or industry?
- \_\_\_\_\_ In what year did you first join the organization?
- \_\_\_\_\_ In what year did you first become involved as a volunteer for the organization?
- \_\_\_\_\_ In what year did you first become involved as a volunteer for an affiliate?
- \_\_\_\_\_ In what year did you most recently serve as volunteer directly for the organization?
- \_\_\_\_\_ In what year did you most recently serve as volunteer for an affiliate?
- \_\_\_\_\_ Hours served annually directly for the organization
- \_\_\_\_\_ Hours served annually directly for affiliate

##### 2a. How many total hours per year have you spent volunteering in your current or most recent position(s)?

- \_\_\_\_\_ Hours served annually directly for the organization
- \_\_\_\_\_ Hours served annually directly for affiliate

##### 2b. Which do you regard as your primary volunteer role for the organization and an affiliate?

- ☐ My volunteer service directly for the organization
- ☐ My volunteer service for the affiliate
- ☐ My volunteer service for both levels

**Please base your answers below on the current/most recent role you served, volunteering directly for the organization or affiliate.**

##### 3. What volunteer role(s) do you currently and/or have held directly for the organization or affiliate? (Select all that apply)

- ☐ Member of the Board of Directors
- ☐ Member of the Executive Committee
- ☐ Officer (e.g., President, Vice President, Treasurer, etc.)
- ☐ Chair of committee(s) or task force(s)
- ☐ Member of standing committee(s)
- ☐ Member of informal committee(s) or work group(s)
- ☐ Informal volunteer (i.e., supporting advocacy, monitoring conference rooms, recruiting members, etc.)
- ☐ Thought leader, writing, or speaking for publications or events
- ☐ Other roles (please describe) \_\_\_\_\_

## B. Your Volunteer Experience

### 1. What are the three most important reasons you are or were involved as a volunteer? (Rank using the scale 1-Most important, 2-Second-most important, and 3-Third-most important)

- \_\_\_\_\_ Increasing my personal visibility/advancing my career
- \_\_\_\_\_ Developing my leadership skills
- \_\_\_\_\_ Improving my technical knowledge regarding the industry/profession
- \_\_\_\_\_ Expanding my professional network
- \_\_\_\_\_ Playing a larger role in legislative, regulatory, and professional advocacy
- \_\_\_\_\_ Gaining deeper access to industry/professional information
- \_\_\_\_\_ Business development
- \_\_\_\_\_ Giving back to my industry/profession
- \_\_\_\_\_ Other reasons (please describe below)

### 2. How satisfied are you with your volunteer “career” with the organization or affiliate? (Rank using the scale 5-Very satisfied, 4-Somewhat satisfied, 3-Neither satisfied nor dissatisfied, 2-Somewhat dissatisfied, 1-Very dissatisfied, or NA)

- \_\_\_\_\_ Increasing my personal visibility/advancing my career
- \_\_\_\_\_ Developing my leadership skills
- \_\_\_\_\_ Improving my technical knowledge regarding the industry/profession
- \_\_\_\_\_ Expanding my professional network
- \_\_\_\_\_ Playing a larger role in legislative, regulatory, and professional advocacy
- \_\_\_\_\_ Gaining deeper access to industry/professional information
- \_\_\_\_\_ Business development
- \_\_\_\_\_ Giving back to my industry/profession
- \_\_\_\_\_ Other reasons (please describe below)

\_\_\_\_\_ Overall Career

### 3. Given your answers above, for what reasons are you dissatisfied with your volunteer experiences with the organization or affiliate?

### 4. How does your current level of volunteer engagement compare to your desired level?

- ☐ I am much less engaged than I want to be
- ☐ I am somewhat less engaged than I want to be
- ☐ I am as engaged as I want to be
- ☐ I am somewhat more engaged than I want to be
- ☐ I am much more engaged than I want to be

### 5. In what ways would you want to be more engaged?

### 6. What factors tend to limit your ability to be more engaged as a volunteer? (Select all that apply)

- ☐ Unavoidable time constraints (such as work schedules and work/life balance)
- ☐ Locations for volunteering are inconvenient
- ☐ Lack of support from my employer (such as reimbursement or time off)
- ☐ Cost of travel for volunteer meetings
- ☐ I don't know enough about what other volunteering would entail
- ☐ Organization is not very inclusive or welcoming
- ☐ I volunteered but was never accepted or heard back
- ☐ Other reasons (please describe) \_\_\_\_\_

### 7. Rate how likely you will do the following. (Rank using the scale 5-Very likely, 4-Somewhat likely, 3-Moderately likely, 2-Somewhat unlikely, 1-Not at all likely)

- \_\_\_\_\_ Remain a volunteer for the organization over the next several years
- \_\_\_\_\_ Remain a volunteer for the affiliates over the next several years
- \_\_\_\_\_ Recommend volunteering for the organization to a friend or colleague

**8. To what extent do you believe the pandemic has changed your volunteer participation in your association? (Rank using the scale 5-Substantial increase, 4-Some increase, 3-No effect, 2-Some decrease, 1-Substantial decrease, or Not sure)**

- \_\_\_\_\_ Extent to which I am willing to volunteer
- \_\_\_\_\_ Amount of time I am willing to share as a volunteer
- \_\_\_\_\_ Extent to which I expect my time to be used effectively

**9. What comments or advice can you share with us regarding your volunteer experiences?**

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### C. Assessing the Organization's Volunteer System

**1. To what extent do you agree or disagree with these statements regarding the organization's or affiliate's volunteer system? (Rank using the scale 5-Strongly agree, 4-Somewhat agree, 3-Neither agree nor disagree, 2-Somewhat disagree, 1-Strongly agree, or No opinion)**

- \_\_\_\_\_ Attracts the best people in our field to volunteer
- \_\_\_\_\_ Offers well-designed volunteer roles which provide opportunities to make a meaningful contribution to the industry/profession
- \_\_\_\_\_ Has an open volunteer nomination process: anyone can be considered
- \_\_\_\_\_ Has an effective volunteer selection process: gets volunteers into roles well-suited to their interests, experience, and abilities
- \_\_\_\_\_ Chooses diverse volunteers who represent varied professional backgrounds, demographics, and types of companies/work settings
- \_\_\_\_\_ Provides effective orientation/introduction to my volunteer role(s)
- \_\_\_\_\_ Provides appropriate training as needed to help me succeed in my volunteer role(s)
- \_\_\_\_\_ Provides useful resources which help me succeed in my volunteer role(s)
- \_\_\_\_\_ Provides meaningful feedback regarding my performance
- \_\_\_\_\_ Provides effective succession for leadership roles, ensuring an open door to the next generation of our volunteers
- \_\_\_\_\_ Recognizes/rewards effective volunteer performance

**2. From your answers above, which are the three most important elements of the association's system for you regardless of how well the organization is performing in that area? (Rank using the scale 1-Most important, 2-Second-most important, and 3-Third-most important)**

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**3. How satisfied are you with the following attributes of the organization's or affiliate's volunteer system? (Rank using the scale 5-Very satisfied, 4-Somewhat satisfied, 3-Neither satisfied nor dissatisfied, 2-Somewhat dissatisfied, 1-Very dissatisfied, or NA)**

- \_\_\_\_\_ Quality of association staff who serve as liaison/coordinators of our activities
- \_\_\_\_\_ Receptivity of association staff to my recommendations
- \_\_\_\_\_ Helping me feel that I am giving back to my industry/profession
- \_\_\_\_\_ Working with others toward a common goal
- \_\_\_\_\_ Quality of the volunteer leadership of my committee(s)
- \_\_\_\_\_ Ability to debate/discuss issues openly in a manner that reaches conclusions while vetting opposing viewpoints
- \_\_\_\_\_ Convenient timing of our interactions (calls or in-person meetings)
- \_\_\_\_\_ Reasonableness of the time commitment required of me and my peers
- \_\_\_\_\_ Genuine concern shown regarding the quality of experience that we have as volunteers
- \_\_\_\_\_ Extent to which the organization provides volunteer experiences that motivate me and make me want to stay engaged
- \_\_\_\_\_ Making effective use of the time and talent given by me and my peers
- \_\_\_\_\_ Overall satisfaction with their volunteer management system



### D. Organization's Assessment of Volunteer Performance

**1. Does your organization conduct a formal/informal evaluation of volunteer performance in roles that you serve?**

- ☐ Yes
- ☐ No

**2. If yes, how are these evaluations conducted?**  
(Select all that apply)

- ☐ Self-assessment by individual volunteers
- ☐ Assessment by volunteer chair/supervisor
- ☐ Assessment by the Board, nominating committee, or similar body
- ☐ Assessment conducted by staff
- ☐ An anonymous survey conducted of all volunteers
- ☐ Other (please describe) \_\_\_\_\_

**3. With whom are these evaluations shared?**  
(Select all that apply)

- ☐ Board/Officers
- ☐ Workgroup/task force leaders
- ☐ Staff
- ☐ The individual volunteers
- ☐ Committee chairs
- ☐ Other (please describe) \_\_\_\_\_
- ☐ No one

**4. If conducted, to what extent are the results of these evaluations (regardless of how conducted or shared) used to improve the performance of individual volunteers or volunteer groups?**  
(Select all that apply)

- ☐ To make decisions regarding selection of an individual for other roles
- ☐ To identify areas for additional training
- ☐ To identify individuals and/or groups for recognition/reward
- ☐ Not sure
- ☐ Nothing is done
- ☐ Other (please describe) \_\_\_\_\_

**5. In your opinion, how important are the following attributes for effective volunteers? (Rank using the scale 5-Very important, 4-Somewhat important, 3-Neutral, 2-Somewhat unimportant, 1-Not at all important)**

**Volunteer Leaders**

- ☐ Leaders are objective
- ☐ Leaders are well-liked by individual volunteers
- ☐ Leaders are effective and well-regarded for the quality of their leadership
- ☐ Leaders ensure their group completes its work within planned budgets and timelines
- ☐ Leaders ensure that their group adheres to/advances our organization's strategic goals
- ☐ Group members express satisfaction with the quality of the group's leadership
- ☐ Other qualities (describe) \_\_\_\_\_

**Individual Volunteers**

- ☐ Volunteers complete their tasks as assigned
- ☐ Volunteers contribute ideas/suggestions that advance the group's goals
- ☐ Volunteers prepare in advance of meetings/assignments
- ☐ Volunteers participate in a timely manner
- ☐ Volunteers ask appropriate questions
- ☐ Volunteers collaborate well with other volunteers
- ☐ Other qualities (describe) \_\_\_\_\_

**Volunteer Group (Board, Committee, Task force, etc.)**

- ☐ Group achieves goals within planned budget and timeline
- ☐ Group adheres to/advances the organization's strategic goals
- ☐ Other qualities (describe) \_\_\_\_\_

**6. What percentage of volunteers in your association would you estimate are: (Answer so the total=100%)**

\_\_\_\_\_ Highly effective  
\_\_\_\_\_ Mostly effective  
\_\_\_\_\_ Somewhat effective  
\_\_\_\_\_ Not at all effective

**100% Total**

### E. Your Profile Please note that all responses are confidential.

#### 1. Which best describes your current job function or career status?

- ☐ Executive management (President, CEO, Owner)
- ☐ Other senior management (Partner, GM, SVP/VP, C-suite positions)
- ☐ Mid-level management (Director, Manager or Supervisor)
- ☐ Entry level professional
- ☐ Other (please describe) \_\_\_\_\_

#### 2. In what continent/area of the world do you live?

\_\_\_\_\_

#### 3. In what state/province do you work?

\_\_\_\_\_

#### 4. Which best describes the type of organization in which you are employed?

- ☐ Private sector/private industry
- ☐ Academia/education/school
- ☐ Nonprofit organization
- ☐ Government
- ☐ Self-employed/solo practice/independent consultant
- ☐ Other (please describe) \_\_\_\_\_

#### 5. Which best describes your highest level of education?

- ☐ High school or less
- ☐ Some college
- ☐ Associates degree or equivalent
- ☐ Bachelor's degree or equivalent
- ☐ Master's degree or equivalent
- ☐ Doctorate/terminal degree (MD, DDS, PhD, JD, EdD or equivalents)
- ☐ Other (please describe) \_\_\_\_\_

#### 6. What is the approximate size of your employer in terms of total staff (all locations)?

- ☐ 1-24
- ☐ 25-49
- ☐ 50-99
- ☐ 100-249
- ☐ 250-499
- ☐ 500-999
- ☐ 1,000-2,499
- ☐ 2,500-9,999
- ☐ 10,000+

#### 7. What is your approximate age?

- ☐ Under 30
- ☐ 30s
- ☐ 40s
- ☐ 50s
- ☐ 60s
- ☐ 70 or older

#### 8. With which gender identity do you most identify?

- ☐ Woman
- ☐ Man
- ☐ Non-binary/non-conforming
- ☐ Transgender
- ☐ Prefer to self-describe \_\_\_\_\_
- ☐ Prefer not to answer

#### 9. With which race do you identify? (Select all that apply.)

- ☐ Asian
- ☐ Bi/Multiracial
- ☐ Black or African American
- ☐ Hispanic, Latino, or Spanish origin
- ☐ Native American or Alaska Native
- ☐ Native Hawaiian or Other Pacific Islander
- ☐ White
- ☐ Prefer to self-describe \_\_\_\_\_
- ☐ Prefer not to answer

**Thank you for participating in the Volunteer Experience Survey**

### Recommended Reading

Brudney, Jeffrey L. & Lucas Meijs, C.P.M. 2014. "Models of Volunteer Management: Professional Volunteer Program Management in Social Work." *Human Service Organizations: Management, Leadership & Governance* 38:3: 297-309. doi:10.1080/23303131.2014.899281.

Brudney, Jeffrey L., & Lucas C. P. M. Meijs. 2009. "It Ain't Natural: Toward a New (Natural) Resource Conceptualization for Volunteer Management." *Nonprofit and Voluntary Sector Quarterly* 38 (4): 564-81. doi:10.1177/0899764009333828.

Burych, Christine, Alison Caird, Joanne Fine Schwebel, Michael Fliess, and Heather Hardie. 2016. "Measuring the Impact of Volunteers." (Philadelphia: Energize, Inc.).

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Einolf, Christopher. 2018. "Evidence-based volunteer management: A review of the literature." *Voluntary Sector Review* 9. 10.1332. doi:10.1332/204080518X15299334470348.

Hager, Mark A. & Jeffrey L. Brudney. 2004. "Volunteer Management Practices and Retention of Volunteers." (Washington, DC: The Urban Institute).

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Kappelides, Pam, & Tobi Johnson. 2020a. "A Heavy Load: Challenges and Current Practices for Volunteer Managers in the USA, Australia, and Canada." *Journal of Nonprofit & Public Sector Marketing* 32:1: 4-24. doi:10.1080/10495142.2019.1668329.

Kappelides, Pam, & Tobi Johnson. 2020b. "Volunteer Management Progress Report." (VolunteerPro).

### Research Principles

Research is the systematic investigation aimed at the discovery and interpretation of facts, resulting in findings which support the practical application of knowledge. As a leader in the association research community, the ASAE Research Foundation has both the opportunity and the obligation to set and adhere to the highest standards of quality and integrity when producing, sponsoring, and reporting research findings.

- For market and industry research, we adhere to the AAPOR Code of Professional Ethics and Practices and CASRO Code of Standards and Ethics.
- For research, where applicable, we adhere to AAPOR Guidance for IRBs and Survey Researchers where the use of human subjects would apply. This is not typical of our research.

#### References::

- **AAPOR:**  
<https://www.aapor.org/Standards-Ethics/AAPOR-Code-of-Ethics.aspx>
- **CASRO:ASRO:**  
<https://www.insightsassociation.org/issues-policies/casro-code-standards-and-ethics>
- **AAPOR IRB guidance:**  
<https://www.aapor.org/Standards-Ethics/Institutional-Review-Boards/Full-AAPOR-IRB-Statement.aspx>